TRAVEL PRINTOUT

Supported by a grant from Travel Industry Association of America

Research News for the U.S. Travel Industry

U.S. Travel Data Center

October 1984 Volume 13, Number 10

SPEAKERS EXPRESS RESTRAINED OPTIMISM AT TRAVEL OUTLOOK FORUM

Echoing the mood of U.S. Travel Data Center Director Douglas C. Frechtling's summary of the travel industry up to mid-year 1984, panelists and speakers at the tenth annual Travel Outlook Forum on September 14 projected a generally confident picture for the industry in the coming year, but avoided unqualified rhapsodies about its prospects.

Frechtling reported that although travel industry receipts in the first half of 1984 rose nearly 11 percent over year-earlier figures, a rate of growth nearly 20 percent greater than that registered in 1983, U.S. resident travel during first-half 1984 fell 4 percent from the previous year, suggesting some deterioration from the 1 percent decline for full year 1983. Frechtling attributed the decline to dramatically increased purchases of consumer durable goods such as houses, automobiles and home furnishings.

John Naisbitt, author of the best-selling Megatrends, told the forum that leisure, travel and entertainment will be a major economic growth area for the future, due to increasing affluence and vacation time and a decrease in the average number of working hours per week.

Director of the U.S. Travel and Tourism Administration's Office of Research Don Wynegar predicted a varied worldwide market for travel to the U.S. and a relatively flat 1985. Total outbound travel overseas will continue to be strong, helped by North Atlantic fare wars and the strength of the dollar abroad, although the rate of the dollar's appreciation is expected to show a downturn of about 5 percent during 1985.

Charles Lieberman, vice president and senior economist at Shearson Lehman/American Express, predicted that airline deregulation and the relative decline of unions as a force in the labor market will provide the downward pressures on wages that enable air carriers to charge the lower fares. However, growth in the travel industry will not be uniform, Lieberman said. "When airline fares come down as much as they have on some routes, the competitive pressures will fan out to other competing industries."

Panels presented the outlook for various travel industry sectors, including a panel on business travel which projected that the rate of business traffic growth will be double the GNP growth rate for 1985. The business lodging market will continue to improve amenities for business travelers, although frequent traveler programs may not continue as they have in the past, as these programs are quite costly. Business travel from the U.S. to Europe will show more growth than from Europe to the U.S., reflecting the relative strength of the dollar.

The panel on air transportation

(Continued on page 3)

FIRST QUARTER TRAVEL DECLINES

The number of American travelers during the first quarter of 1984 declined 7 percent from levels recorded one year earlier, according to the U.S. Travel Data Center's 1984 National Travel Survey First Quarter Report, released today.

U.S. residents took 152 million person-trips during first quarter 1984, 23.5 million fewer person-trips than during the same quarter of 1983, a 13 percent drop. (A person-trip is mea-

(Continued on page 3)

TRAVEL PRICES RISE MODERATELY IN AUGUST

Moderating transportation costs held the increase in the cost of travel in the U.S. in August to 0.6 percent, according to the U.S. Travel Data Center's Travel Price Index (TPI). August's increase follows a 1.1 percent jump registered in July.

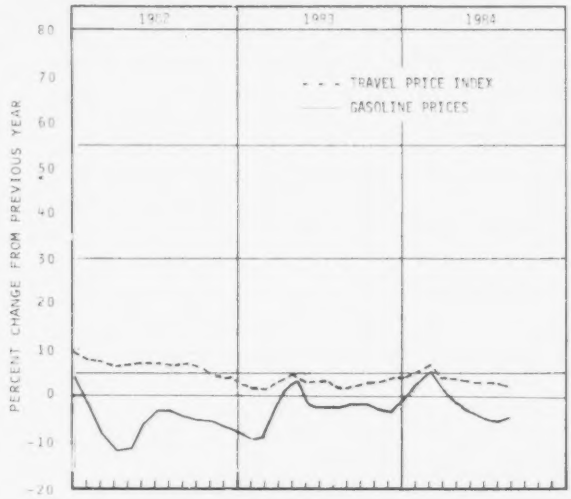
For comparison, the Consumer Price Index (CPI) rose 0.4 percent on a seasonally unadjusted basis in August 1984.

The TPI, which measures changes in the seasonally unadjusted cost of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in this country, stood at 369.6 in August (1967=100).

The cost of lodging while out of town climbed 1.8 percent to lead all TPI components, followed by a 1.0 percent increase in incidentals. Airline fares rose 0.9 percent.

On the other hand, gasoline prices dropped 1.1 percent from July's level, while taxicab and intercity train fares remained unchanged from the previous month.

The TPI has increased 4.2 percent since July of last year, the same as the increase in the CPI. Lodging costs grew 8.5 percent to lead all components during this period, followed by a 7.9 percent increase in airline fares. Gasoline prices, however, are 6.1 percent lower than one year ago. ##



DECLINING GASOLINE PRICES MODERATE TPI

Monthly and Annual Rates of Change in the Travel Price Index and Components
August, 1984

TPI Component	Monthly Percent Change July, 1984 to August, 1984	Annual Percent Change August, 1983 to August, 1984
Transportation	0.0	1.3
Airline Fares	0.9	7.9
Intercity Bus Fares	0.5	6.9
Intercity Train Fares	0.0	4.8
Taxicab Fares	0.0	2.6
Gasoline	-1.1	-6.1
Lodging	1.8	8.5
Food Away From Home	0.3	4.5
Entertainment Services	0.5	6.0
Incidentals	1.0	2.1
TRAVEL PRICE INDEX	0.6	4.2
CONSUMER PRICE INDEX	0.4	4.2

Source: U.S. Travel Data Center and U.S. Bureau of Labor Statistics

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research, 1899 L Street, N.W., Washington, DC 20036. Telephone number, (202) 293-1040. Dr. Douglas C. Frechtling, Director. Ida Simmons, Editor. ISSN: 0744-6233.

TRAVEL PRINTOUT reports on the results of Data Center projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are available for $45 per year, U.S., Canada and Mexico; other foreign countries, $55 per year, payable in U.S. funds only.

FORUM (CONTINUED FROM PAGE 1)

projected a 5 percent growth rate for airlines through 1989, with growth in the major airlines somewhat slower. The number of travel agents will increase about 10 percent in 1985. Commissions will continue to rise because of airline competition, and automation will become an increasing part of airline ticket sales.

The panel on ground transportation suggested that a key factor in rail transportation growth will be continuing innovative marketing and expansion of regular train services such as the auto-train. Fuel supplies and prices show good stability, indicating highway travel will continue to be strong, although bus travel faces a 7 percent decline in revenues for 1984 and a 5 percent decline for 1985.

SURVEY (CONTINUED FROM PAGE 1)

sured each time anyone goes 100 miles or more away from home.)

Continuing the trend towards increasing trip duration evident since the first quarter of last year, the average trip during first quarter 1984 lasted 5.2 nights, up from 5.1 nights last year. However, average trip distances declined 1 percent.

Travel for "other pleasure" purposes such as outdoor recreation, sightseeing and entertainment, had the smallest decline, 7 percent. Vacation person-trips declined 5 percent, and convention/business travel fell 7.5 percent.

The Mountain West region was the only destination area to report growth for first quarter 1984 over last year, although travel to The South still comprised the largest share in the U.S.

The 1984 National Travel Survey First Quarter Report is based on telephone interviews with over 1,400 adult Americans each month. It is being sent to members of the Data Center and is available to others for $65.00 prepaid from the U.S. Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036. ##

The panel on accommodations projected a 10.3 percent increase in hotel/motel room sales for 1985, along with a 6 percent increase in room rates. Transportation- or tourism-related foodservice will experience an almost 7 percent increase in 1984, continuing strong growth into 1985. The cruise sector also shows strong growth potential for 1985, with more ships offering more amenities under construction. Cruises of seven days or more are now gaining popularity over shorter cruises.

According to the panel on recreation and attractions, attendance at cultural attractions and participation in outdoor recreation is up across the board. Growth in the theme park industry, projected to be 5 percent for 1985, will be limited by a lack of increase in average per capita leisure time in the near future.

The complete and updated forum proceedings will be available in the 1985 Outlook for Travel and Tourism, to be released in January. It will be sent to Data Center members and is available to others by sending $75 (prepaid only) to the U.S. Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036. ##

BRIEFS

The survey research firm with whom the Data Center works to produce the monthly National Travel Survey is currently upgrading its computer system.

This has delayed the analysis of the July survey results. Travel Printout apologizes for any inconvenience to its subscribers. ##

CORRECTION

The column headings for the Current Travel Indicators table in September's Travel Printout were mistakenly listed as "September", "% Change from August 1984" and "% Change from September, 1983".

The correct headings should have read: "June", "% Change from May, 1984" and "% Change from June, 1983". ##

States comprising the Census regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. MIDDLE ATLANTIC: New Jersey, New York, Pennsylvania. SOUTH EAST: Alabama, Delaware, Florida, Georgia, Kentucky, Maryland, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia. EAST NORTH CENTRAL: Indiana, Illinois, Michigan, Ohio, Wisconsin. WEST NORTH CENTRAL: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. WEST SOUTH CENTRAL: Arkansas, Louisiana, Oklahoma, Texas. MOUNTAIN: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. PACIFIC: Alaska, California, Hawaii, Oregon, Washington.

CURRENT TRAVEL INDICATORS

	July 1984	% Change from June 1984	% Change from July 1983	Year-to-date % change 1984/83
Establishment receipts or retail sales				
Hotels, motels and other lodging places(1)	$ 3,227 million	10.2	16.5	15.0
Eating and drinking places(2)	$10,396 million	0.4	6.9	7.8
Gasoline service stations(2)	$ 8,478 million	- 3.0	- 3.0	3.4
Commercial lodging demand				
Hotel/motel occupancy rate(3)	68.8 percent	5.7	1.5	2.3
Real demand for commercial lodging(4)	$1,121 million	8.2	8.1	6.7
Airline passenger traffic(5)				
Domestic revenue passenger-miles	17.6 billion	- 0.1	1.5	- 1.5
International revenue passenger-miles	6.1 billion	5.7	6.9	13.5
Bus passenger traffic(6)				
Intercity bus passenger-miles	3.0 billion	15.4	- 3.2	- 2.9
Highway traffic volume(7)				
Rural arterial vehicle-miles	44.9 billion	8.0	3.3	5.4
Rail passenger traffic(8)				
Amtrak passenger-miles	484.4 million	0.1	- 0.5	8.8
Travel Price Index(9)	367.3	0.9	4.2	4.7
U.S. resident travel(10)				
Total person-trips	104.9 million	-10.0	-15.5	- 6.8
Vacation person-trips	85.0 million	- 0.6	- 5.0	9.1
Public use of national parks(11)				
Visits	38,264,238	25.8	- 6.5	- 5.7
Overnight stays	4,207,101	32.4	30.3	18.0
Foreign arrivals in U.S.(12)				
From overseas	N/A	N/A	N/A	N/A
From Canada	1,437,85[illegible]	81.0	-21.3	- 5.8
U.S. citizen departures(12)				
To overseas	N/A	N/A	N/A	N/A
To Canada	2,261,229	41.8	- 2.1	2.0
Domestic demand for motor gasoline(13)				
Barrels per day	6,481 thousand	- 7.0	- 3.4	0.9

(1)Source: Laventhol and Horwath, seasonally unadjusted. (2)Preliminary; adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3)Source: Laventhol and Horwath, seasonally adjusted. (4)Source: Laventhol and Horwath, unadjusted expenditures for commercial lodging adjusted for inflation since 1972. (5)Preliminary; U.S. scheduled service air carriers. Source: Civil Aeronautics Board. (6)All carriers regular route and charter service. Source: American Bus Association. (7)Source: Federal Highway Administration. (8)Source: National Railroad Passenger Corporation (Amtrak). (9)Source: U.S. Travel Data Center and Bureau of Labor Statistics. (10)Source: U.S. Travel Data Center. (11)Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12)Source: U.S. Travel and Tourism Administration and Nettleton Travel Research Center. (13)Preliminary; Source: U.S. Department of Energy.

U.S. Travel Data Center

1899
L Street
Northwest
Washington, D.C.
20036
(202) 293-1040

U.S. POSTAGE
PAID
FIRST CLASS
PERMIT NO. 45523
WASHINGTON, D.C.

October 1984

TRAVEL PRINTOUT

Research News for the U.S. Travel Industry

Jeanne Long
Congressional Information
Service
4520 East-West Hwy., Ste. 800
Bethesda MD 20814

13/1s/84 R9375-1A

TRAVEL PRINTOUT

Supported by a grant from Travel Industry Association of America

U.S. Travel Data Center

Research News for the U.S. Travel Industry

November 1984 Volume 13, Number 11

TRAVEL INDUSTRY PROVIDED NEARLY HALF OF ALL NEW JOBS IN 1983

The U.S. travel industry, including transportation, accommodation, foodservice and recreation firms, produced 246 thousand additional jobs in 1983, 43 percent of all new jobs for the year.

Travel spending in the U.S. directly supported more than 4.6 million jobs, making the industry the third largest retail or service employer in the nation, following food stores and automotive dealers.

The 1983-84 Economic Review of Travel in America, released recently by the U.S. Travel Data Center, also noted industry receipts outpaced the overall economy in both real and dollar terms in 1983. Overall, travelers in America spent $210 billion, 6.4 percent of the gross national product.

"The travel industry continues to be an abundant source of job opportunities in good economic times and bad," noted Dr. Douglas C. Frechtling, Director of the Data Center. "Our report indicates travel bolsters regional economies throughout the nation."

While the number of foreign visitors to the U.S. declined 1 percent from 1982, to 21.7 million, and their expenditures declined for the second consecutive year, travel spending in America still produced over $25 billion in federal, state and local tax revenue, according to the report.

Travel price inflation fell to an annual growth rate of 4 percent in 1983, the lowest rate in more than a decade. The 80-page report contains charts, tables and narrative on trends in travel and tourism and their economic impact on the U.S. economy from 1973 to the present, and includes chapters on international visitors and regional visitation patterns.

The 1983-84 Economic Review of Travel in America is being sent to Data Center members and is available to others for $45.00 prepaid from the U.S. Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036. ##

U.S. TRAVEL DATA CENTER TO RELEASE 1985 OUTLOOK FOR TRAVEL

Panelists and speakers at the U.S. Travel Data Center's annual Travel Outlook Forum will present their updated remarks, charts and tables in the 1985 Outlook for Travel and Tourism, to be released in mid-January.

The 1985 Outlook will be sent to Data Center members; it will be available on January 20 to others for $75.00 prepaid from the U.S. Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036. ##

TRAVEL ADVERTISING EXPENDITURES ROSE IN 1983

Total advertising expenditures for the travel industry increased by approximately $66 million between 1982 and 1983, a gain of 10 percent, according to a report released in September by Olgilvy & Mather, a New York advertising firm.

Trends in Travel and Tourism Advertising Expenditures, which offers a detailed analysis of advertising expenditures by U.S. and foreign sectors of the travel industry, also reported that advertising expenditures of U.S. states declined 11 percent from 1982 levels. Other domestic destinations such as

(Continued on page 3)

TRAVEL PRICES DECLINE IN SEPTEMBER

Falling airline fares and lodging rates led a 0.2 percent drop in the cost of travel in the U.S. in September, the first decline in nine months, according to the U.S. Travel Data Center's Travel Price Index (TPI).

For comparison, the Consumer Price Index (CPI) rose 0.5 percent on a seasonally unadjusted basis in September 1984.

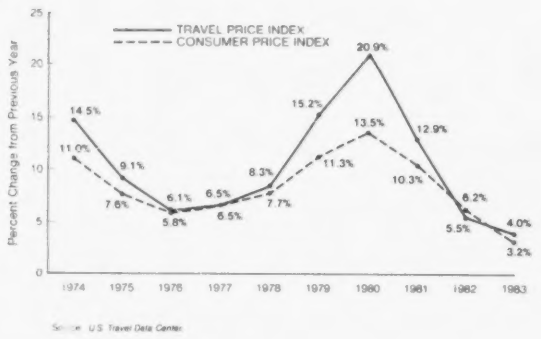
The TPI, which measures changes in the seasonally unadjusted cost of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in this country, dropped to 368.9 in September (1967=100).

Airline fares fell 0.9 percent and lodging out of town decreased 0.7 percent from the previous month. Intercity train fares remained unchanged while taxicab fares rose a mere 0.1 percent in September.

The cost of incidentals, however, climbed 1.0 percent to lead all TPI components, followed by a 0.6 percent increase in entertainment services. Gasoline prices posted their first increase in four months, rising 0.5 percent.

The TPI has increased 3.9 percent since August of last year, slower than the 4.2 percent increase in the CPI. Lodging costs grew 8.1 percent to lead all other components during this period, followed by a 6.5 percent increase in intercity bus fares. Gasoline prices, however, are 5.0 percent lower than one year ago. ##

TRAVEL PRICE INFLATION DECLINED IN 1983



Source: U.S. Travel Data Center

Monthly and Annual Rates of Change in the Travel Price Index and Components, September 1984

TPI Component	Monthly Percent Change August, 1984 to September, 1984	Annual Percent Change September, 1983 to September, 1984
Transportation	0.0	1.3
Airline Fares	- 0.9	6.3
Intercity Bus Fares	0.2	6.5
Intercity Train Fares	0.0	4.7
Taxicab Fares	0.1	2.4
Gasoline	0.5	- 5.0
Lodging	- 0.7	8.1
Food Away From Home	0.1	4.2
Entertainment Services	0.6	5.7
Incidentals	1.0	2.4
TRAVEL PRICE INDEX	- 0.2	3.9
CONSUMER PRICE INDEX	0.5	4.2

Source: U.S. Travel Data Center and U.S. Bureau of Labor Statistics

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research, 1899 L Street, N.W., Washington, DC 20036. Telephone number, (202) 293-1040. Dr. Douglas C. Frechtling, Director. Ida Simmons, Editor. ISSN: 0744-6233.

TRAVEL PRINTOUT reports on the results of Data Center projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are available for $45 per year, U.S., Canada and Mexico; other foreign countries, $55 per year, payable in U.S. funds only.

JULY TRAVEL DECLINES SUBSTANTIALLY

Travel during July fell nearly 8 percent below year-earlier levels, according to the U.S. Travel Data Center's latest National Travel Survey results.

Following a 0.6 percent drop in June, travel by Americans totaled 115 million person-trips in July 1984, down from 124 million one year earlier. (A person-trip is measured each time anyone goes 100 miles or more away from home.)

The monthly telephone survey reported that vacation travel fell 5 percent below that for July 1983. Travel for business or convention purposes grew substantially, the only travel component to record an increase for the month. Weekend travel, which has declined steadily since June 1983, posted the largest drop during the month, falling nearly 15 percent.

Trips by air increased 6 percent over year-earlier levels, continuing a five-month upward trend, although a drop in the size of travel party resulted in a 4 percent decline in the number of person-trips taken by air. Auto/truck/RV travel fell sharply, showing a 9.6 percent decline from the previous year's level.

Average round-trip distance increased from 780 miles one year ago to 960 miles in July 1984; however, average trip duration remained the same, with Americans spending an average of 5.3 nights away from home.

Although The South attracted the greatest share of travel for all destination regions, 22 percent, the Great Lakes Country region experienced the largest rate of growth and was the major producer of travel for the month. Despite the Olympic Games, travel to the Far West declined.

The survey also showed vacation travel intentions for the next six months remained unchanged from July 1983. Of those planning a vacation trip, 57 percent intend to travel by personal motor vehicle, up 3 percent from one year ago. The number planning to travel by air remained unchanged, 44 percent of the total.

Plans to use commercial lodging increased 1 percent, comprising 41 percent of the total, while the number of travelers planning to stay with friends and relatives declined 6 percent. The average duration of these intended vacation trips is 8.4 nights, up from 8.3 nights in July 1983. ##

(CONTINUED FROM PAGE 1)

cities or territories increased spending on advertising by 40 percent.

Although U.S. flag airlines accounted for about 73 percent of travel advertising expenditures, steamship lines increased their spending by 22 percent in 1983, the highest relative gain over 1982 for any major travel industry sector.

Newspapers garnered the largest share of advertising by both U.S. and foreign flag airlines, as well as steamship lines, and U.S. states bought the largest share of their advertising on radio. Other U.S. destinations advertised most heavily in magazines, as did foreign countries.

Trends in Travel and Tourism Advertising Expenditures is available for $35.00 prepaid from Olgilvy & Mather Inc., 2 East 48th Street, New York, NY 10017. ##

States comprising the Census regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. **MIDDLE ATLANTIC:** New Jersey, New York, Pennsylvania. **SOUTH EAST:** Alabama, Delaware, Florida, Georgia, Kentucky, Maryland, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia. **EAST NORTH CENTRAL:** Indiana, Illinois, Michigan, Ohio, Wisconsin. **WEST NORTH CENTRAL:** Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. **WEST SOUTH CENTRAL:** Arkansas, Louisiana, Oklahoma, Texas. **MOUNTAIN:** Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. **PACIFIC:** Alaska, California, Hawaii, Oregon, Washington.

CURRENT TRAVEL INDICATORS

	August 1984	% Change from July 1984	% Change from August 1984	Year-to-date % change 1984/83
Establishment receipts or retail sales				
Hotels, motels and other lodging places(1)	$ 3,257 million	0.9	11.2	14.4
Eating and drinking places(2)	$11,159 million	7.3	7.1	7.7
Gasoline service stations(2)	$ 9,106 million	7.4	- 2.7	2.6
Commercial lodging demand				
Hotel/motel occupancy rate(3)	64.8 percent	0.0	- 0.6	2.1
Real demand for commercial lodging(4)	$1,114 million	- 0.6	3.1	6.2
Airline passenger traffic(5)				
Domestic revenue passenger-miles	18.8 billion	- 0.2	7.0	- 0.3
International revenue passenger-miles	6.4 billion	5.3	10.1	13.0
Bus passenger traffic(6)				
Intercity bus passenger-miles	3.1 billion	3.3	- 0.6	- 2.5
Highway traffic volume(7)				
Rural arterial vehicle-miles	45.3 billion	0.6	6.7	5.6
Rail passenger traffic(8)				
Amtrak passenger-miles	484.8 million	0.1	- 0.5	7.3
Travel Price Index(9)	369.6	0.6	4.2	4.7
U.S. resident travel(10)				
Total person-trips	132.2 million	26.0	- 1.6	- 5.9
Vacation person-trips	97.1 million	14.2	- 2.9	6.3
Public use of national parks(11)				
Visits	36,147,362	- 5.5	1.8	- 4.2
Overnight stays	3,280,072	-22.0	2.7	14.0
Foreign arrivals in U.S.(12)				
From overseas	N/A	N/A	N/A	N/A
From Canada	1,440,201	0.2	-16.5	- 8.4
U.S. citizen departures(12)				
To overseas	N/A	N/A	N/A	N/A
To Canada	2,402,853	-16.0	26.4	7.8
Domestic demand for motor gasoline(13)				
Barrels per day	6,436 thousand	- 0.7	- 7.3	- 0.2

(1)Source: Laventhol and Horwath, seasonally unadjusted. (2)Preliminary; adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3)Source: Laventhol and Horwath, seasonally adjusted. (4)Source: Laventhol and Horwath, unadjusted expenditures for commercial lodging adjusted for inflation since 1972. (5)Preliminary; U.S. scheduled service air carriers. Source: Civil Aeronautics Board. (6)All carriers regular route and charter service. Source: American Bus Association. (7)Source: Federal Highway Administration. (8)Source: National Railroad Passenger Corporation (Amtrak). (9)Source: U.S. Travel Data Center and Bureau of Labor Statistics. (10)Source: U.S. Travel Data Center. (11)Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12)Source: U.S. Travel and Tourism Administration and Nettleton Travel Research Center. (13)Preliminary; Source: U.S. Department of Energy.

U.S. Travel Data Center

1899
L Street
Northwest
Washington, D.C.
20036
(202) 293-1040

U.S. POSTAGE
PAID
FIRST CLASS
PERMIT NO. 45523
WASHINGTON, D.C.

November 1984

TRAVEL PRINTOUT

Research News for the U.S. Travel Industry

Jeanne Long
Congressional Information Service
4520 East-West Hwy., Ste. 800
Bethesda MD 20814

R9375-1

TRAVEL PRINTOUT

Supported by a grant from Travel Industry Association of America

U.S. Travel Data Center

Research News for the U.S. Travel Industry

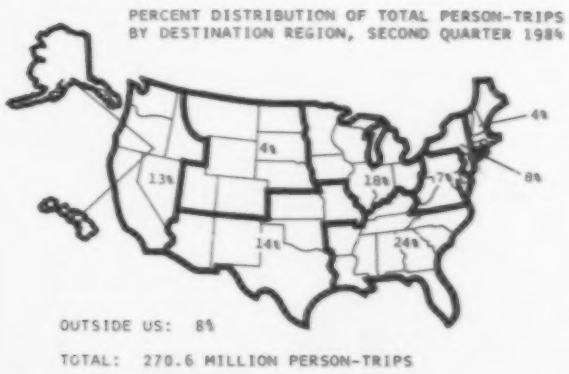
December 1984 Volume 13, Number 12

SECOND QUARTER 1984 TRAVEL INCREASES SLIGHTLY OVER PREVIOUS YEAR

Despite a favorable economic climate, travel for the second quarter of 1984 barely exceeded year-earlier levels as Americans apparently continued to concentrate on restocking durable goods, according to the U.S. Travel Data Center's 1984 National Travel Survey Second Quarter Report, released today.

Americans took 270 million person-trips during April, May and June 1984, according to the report, an increase of nearly 2 percent over the same period in 1983. (A person-trip is measured each time anyone goes 100 miles or more away from home.) A decline in travel for convention and business purposes nearly offset gains in vacation travel and travel for "other pleasure" such as sightseeing, recreation or entertainment.

Vacation trips were shorter both in distance, averaging 840 miles (down from 1,020 miles last year), and in duration, averaging 5.6 nights (down from 6.1 nights).



Travel by personal motor vehicle, which accounted for the majority of travel during the second quarter of 1984, increased 1 percent from second quarter of last year. Travel by air increased almost 9 percent over year-earlier levels.

The number of travelers lodging in hotels or motels rose 7 percent, while those staying with friends or relatives increased 6 percent.

Travelers with annual household income of $30,000 or more have accounted for over half the person-trips recorded in recent months, and travel by this group rose 9 percent in second quarter 1984. Travel by families in the $20,000 to $29,000 income category increased even more, while households earning less than $20,000 annually reduced their level of travel significantly below second quarter 1983.

The 1984 National Travel Survey Second Quarter Report is being sent to members and is available to others for $65.00 prepaid from the U.S. Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036. ##

U.S. TRAVEL DATA CENTER ELECTS AMTRAK VICE PRESIDENT AS CHAIRMAN

Robert E. Gall, vice president of transportation marketing for Amtrak, will serve as the U.S. Travel Data Center's Board of Trustees chairman for 1985. Gall, elected at the board's December meeting, has been a trustee since 1980 and served as vice chairman in 1984. He replaces Bob LeBlanc, director of the Louisiana Division of Tourism, who will return for another two-year term as trustee.

(Continued on Page 3)

TRAVEL PRICES REMAIN UNCHANGED IN OCTOBER

The cost of travel in the U.S. remained unchanged in October, the second consecutive month in which no change has occurred, according to the U.S. Travel Data Center's Travel Price Index (TPI).

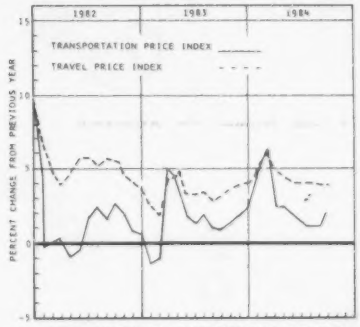
For comparison, the Consumer Price Index (CPI) rose 0.3 percent on a seasonally unadjusted basis in October 1984.

The TPI, which measures changes in the seasonally unadjusted cost of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in this country, was unchanged at 369.0 in October (1967=100).

Lodging rates dropped 1.3 percent, the only TPI component to decrease in October. Intercity train fares remained unchanged.

Airfares showed the largest gain, 0.8 percent, followed by bus fares, up 0.7 percent. Gasoline prices advanced 0.7 percent for their second straight monthly increase.

The TPI has risen 3.9 percent since October of last year, compared to 4.2 percent growth in the CPI. Commercial lodging grew 6.8 percent, leading all components during this period, followed by a 6.6 percent increase in intercity bus fares. However, gasoline prices declined 3.2 percent over the last year.##



RECENT FLUCTUATIONS IN TRANSPORTATION COSTS HAVE LITTLE EFFECT ON OVERALL INDEX

Monthly and Annual Rates of Change in the Travel Price Index and Components, October 1984

TPI Component	Monthly Percent Change September, 1984 to October, 1984	Annual Percent Change October, 1983 to October, 1984
Transportation	0.7	2.0
Airline Fares	0.8	6.3
Intercity Bus Fares	0.7	6.6
Intercity Train Fares	0.0	4.5
Taxicab Fares	0.1	2.6
Gasoline	0.7	- 3.2
Lodging	- 1.4	6.8
Food Away From Home	0.2	3.9
Entertainment Services	0.6	5.5
Incidentals	0.5	2.5
TRAVEL PRICE INDEX	0.0	3.9
CONSUMER PRICE INDEX	0.3	4.2

Source: U.S. Travel Data Center and U.S. Bureau of Labor Statistics

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research, 1899 L Street, N.W., Washington, DC 20036. Telephone number, (202) 293-1040. Dr. Douglas C. Frechtling, Director. Ida Simmons, Editor. ISSN: 0744-6233.

TRAVEL PRINTOUT reports on the results of Data Center projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are available for $45 per year, U.S., Canada and Mexico; other foreign countries, $55 per year, payable in U.S. funds only.

AUGUST TRAVEL DECLINES

Although August marks the peak of the summer travel season, total travel for the month fell short of the level set in August 1983 by 2 percent, according to the U.S. Travel Data Center's National Travel Survey results, released today.

The monthly telephone survey reported person-trips for the month totaled 132 million, 2 percent below the 135 million recorded last August. (A person-trip is measured each time anyone goes 100 miles or more away from home.) Trips of longer duration, however, produced a 2 percent increase in nights spent away from home in August.

Vacation travel, posting a 3 percent decline in August 1984, failed to exceed year-earlier levels for the second consecutive month but registered an increase over levels recorded in July 1984.

Pleasure travel appeared to follow the same trend this August as vacation travel, rising over July's level, but falling nearly 5 percent from August 1983. Weekend travel declined 8 percent, its smallest decrease since March. These declines were somewhat offset by an increase in travel for business or convention purposes.

Average trip duration rose from 5.4 nights one year earlier to 6 nights in August, and round-trip distance also increased, from 880 round-trip miles in August 1983 to 960 miles.

Travel to The South rose substantially, as did travel to the Mountain West/Far West region. The Northeast, Great Lakes Country and Frontier West regions, however, all recorded declines as destinations.

Vacation travel for June, July and August 1984 totaled 268 million person-trips, an increase of almost 2 percent over summer vacation travel last year. In May the U.S. Travel Data Center had projected a 3 percent rise in vacation person-trips for this summer.

The number of people planning to take a trip during the six months following August 1984 increased 18 percent over last year's figure, although anticipated trip duration remained virtually the same. While most people intended to travel by personal motor vehicle, air travel intentions rose sharply, and plans to stay in hotel/motels on overnight vacation trips rose 2 percent. The South and Frontier West expect to experience the greatest growth in vacation visitors over the next six months. ##

(CONTINUED FROM PAGE 1)

Randall Wagner, director of the Wyoming Travel Commission and a member of the board of trustees since 1982, will serve as vice chairman. The board re-elected Charles R. Goeldner, director of the Business Research Division of the University of Colorado, to serve as secretary, and William Toohey, president of the Travel Industry Association, was re-elected treasurer.

Newly elected trustees are Max L. Madsen, director of travel marketing for Better Homes & Gardens; Laurie Jo Miller, vice president of tourism development, New York Convention and Visitors Bureau; and Troy Woodbury, national market manager for AT&T Communications.

Jesse Liebman, vice president of scheduling and pricing for Trans World Airlines, and Robert L. Richards, executive vice president of the American Hotel and Motel Association, were re-elected to the board of trustees. ##

The U.S. Travel Data Center will release the 1985 Outlook for Travel and Tourism, the complete proceedings of its annual Travel Outlook Forum, on January 20. Data Center members will receive the 1985 Outlook, containing speakers' updated remarks, charts and tabels. It is available to others for $75 prepaid from the U.S. Travel Data Center, 1899 L Street NW, Washington, DC 20036. ##

States comprising the Census regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. MIDDLE ATLANTIC: New Jersey, New York, Pennsylvania. SOUTH EAST: Alabama, Delaware, Florida, Georgia, Kentucky, Maryland, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia. EAST NORTH CENTRAL: Indiana, Illinois, Michigan, Ohio, Wisconsin. WEST NORTH CENTRAL: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. WEST SOUTH CENTRAL: Arkansas, Louisiana, Oklahoma, Texas. MOUNTAIN: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. PACIFIC: Alaska, California, Hawaii, Oregon, Washington.

CURRENT TRAVEL INDICATORS

	September 1984	% Change from August, 1984	% Change from September, 1983	Year-to-date % change 1984/83
Establishment receipts or retail sales				
Hotels, motels and other lodging places(1)	$ 2,978 million	- 8.6	17.6	14.8
Eating and drinking places(2)	$11,627 million	4.2	16.7	8.8
Gasoline service stations(2)	$ 9,153 million	0.5	3.6	2.7
Commercial lodging demand				
Hotel/motel occupancy rate(3)	66.7 percent	2.9	1.4	2.1
Real demand for commercial lodging(4)	$1,024 million	- 8.1	2.4	5.8
Airline passenger traffic(5)				
Domestic revenue passenger-miles	15.2 billion	-19.2	7.1	0.4
International revenue passenger-miles	5.6 billion	-12.5	- 3.6	10.5
Bus passenger traffic(6)				
Intercity bus passenger-miles	2.3 billion	-26.5	- 1.7	- 2.4
Highway traffic volume(7)				
Rural arterial vehicle-miles	38.1 billion	-16.0	- 1.8	4.8
Rail passenger traffic(8)				
Amtrak passenger-miles	331.0 million	-31.7	- 2.7	6.2
Travel Price Index(9)	368.9	- 0.2	3.9	4.6
U.S. resident travel(10)				
Total person-trips	N/A	N/A	N/A	N/A
Vacation person-trips	N/A	N/A	N/A	N/A
Public use of national parks(11)				
Visits	24,860,511	-31.2	- 1.3	- 3.9
Overnight stays	1,790,679	-45.4	- 1.8	12.0
Foreign arrivals in U.S.(12)				
From overseas	N/A	N/A	N/A	N/A
From Canada	965,325	-33.6	- 7.8	- 8.3
U.S. citizen departures(12)				
To overseas	N/A	N/A	N/A	N/A
To Canada	1,202,252	-50.0	- 2.6	6.4
Domestic demand for motor gasoline(13)				
Barrels per day	6,545 thousand	1.7	- 1.6	- 0.3

(1)Source: Laventhol and Horwath, seasonally unadjusted. (2)Preliminary; adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3)Source: Laventhol and Horwath, seasonally adjusted. (4)Source: Laventhol and Horwath, unadjusted expenditures for commercial lodging adjusted for inflation since 1972. (5)Preliminary; U.S. scheduled service air carriers. Source: Civil Aeronautics Board. (6)All carriers regular route and charter service. Source: American Bus Association. (7)Source: Federal Highway Administration. (8)Source: National Railroad Passenger Corporation (Amtrak). (9)Source: U.S. Travel Data Center and Bureau of Labor Statistics. (10)Source: U.S. Travel Data Center. (11)Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12)Source: U.S. Travel and Tourism Administration and Nettleton Travel Research Center. (13)Preliminary; Source: U.S. Department of Energy.

U.S. Travel Data Center

1899
L Street
Northwest
Washington, D.C.
20036
(202) 293-1040

U.S. POSTAGE
PAID
FIRST CLASS
PERMIT NO. 45523
WASHINGTON, D.C.

December 1984

TRAVEL PRINTOUT

Research News for the U.S. Travel Industry

2/13/85 R9375-1

TRAVEL PRINTOUT

Supported by a grant from Travel Industry Association of America

Research News for the U.S. Travel Industry

U.S. Travel Data Center

January 1985 Volume 14, Number 1

STATE TRAVEL DEVELOPMENT BUDGETS RISE 23 PERCENT IN 1984-85

State travel offices in 50 states plan to spend $189 million for travel and tourism development in 1984-85, according to the 1984-85 Survey of State Travel Offices, compiled by the U.S. Travel Data Center.

The survey reports tourism development budgets for the 50 states increased 23 percent over 1983-84. Much of the growth is due to a jump in California's travel development budget, from $469,969 in the previous year to $5,692,375 in fiscal 1984-85. The increase moved California from last place in travel development spending to ninth place.

Thirty-four states posted budget increases for the current year. The average state travel development budget is $3,787,854, an all-time high.

Illinois, which increased its spending 324 percent, has the largest budget, $14 million, followed by New York with more than $12 million.

TOP TEN STATES BY TRAVEL PROMOTION BUDGETS, 1984-85

1.	Illinois	$14,400,000
2.	New York	12,046,400
3.	Massachusetts	10,536,170
4.	Alaska	9,246,800
5.	Florida	9,200,000
6.	Michigan	9,074,900
7.	Pennsylvania	7,860,000
8.	Tennessee	7,234,000
9.	California	5,692,375
10.	New Jersey	5,551,000

Eleven states plan to spend less on travel development, however. Louisiana posted the greatest cutback, decreasing spending by almost 22 percent from last year's figure.

The survey reports a 37 percent increase from the prior year's advertising budget allocations. The average state is devoting more than $1.5 million to advertising, 40 percent of the average total. Illinois is spending the most on advertising of any state, $10 million, or 70 percent of its total travel development budget.

"More and more states are recognizing that tourism plays an essential role in economic development," commented Dr. Douglas C. Frechtling, director of the Data Center. "This year's extraordinary rise in state travel development budgets bodes well for future regional growth and stability."

The 1984-85 Survey of State Travel Offices is the twelfth annual report on the budgets, advertising and programs of the state and U.S. territory tourism development agencies. The 100-page report will be sent to Data Center members and is available for $55.00 prepaid from the U.S. Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036. ##

1986 TRAVEL OUTLOOK FORUM MOVES TO NEW ORLEANS

In conjunction with the Travel Industry Association's National Travel Conference, the U.S. Travel Data Center will hold its 1986 Travel Outlook Forum on September 20, 1985 at the New Orleans Hilton Riverside & Towers Hotel. Don't miss this unique opportunity to hear experts in many sectors of the travel industry predict the trends for the coming year. For more information, contact the U.S. Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036. Mark your calendar now! ##

TRAVEL PRICES DECLINE IN NOVEMBER

Travel costs decreased 0.3 percent in November, the second decline in travel prices during 1984, according to the U.S. Travel Data Center's Travel Price Index (TPI).

The TPI fared well compared to the Consumer Price Index (CPI) as the latter was unchanged on a seasonally unadjusted basis in November.

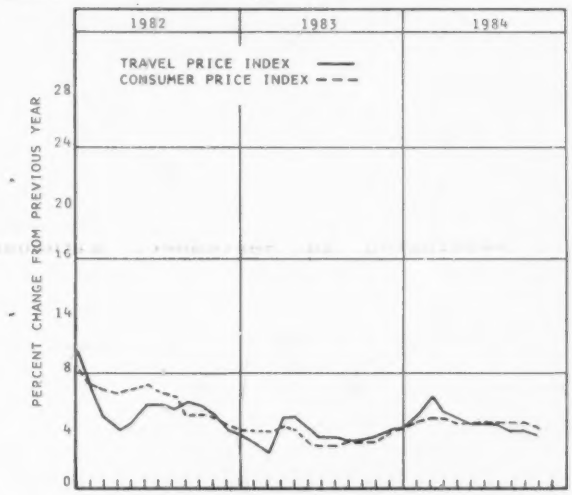
The TPI, which measures changes in the seasonally unadjusted cost of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in this country, fell to 367.8 in November (1967=100).

The prices of both lodging and entertainment dropped 1.4 percent and gasoline prices declined for the first time in three months.

On the other hand, railroad, airplane and intercity bus fares increased 0.4 percent from the previous month. Prices of food away from home rose 0.2 percent and taxicab fares increased 0.1 percent. The only TPI component to remain unchanged from October was incidentals.

Since November of last year, travel prices have increased only 3.7 percent compared to a 4.0 percent growth rate in the CPI.

Intercity bus fares rose the most on a yearly basis, increasing 7.5 percent. Lodging prices, airplane and railroad fares all grew by more than 5 percent over the year. ##



CONSUMER PRICES CONTINUE TO INCREASE FASTER THAN TRAVEL PRICES

Monthly and Annual Rates of Change in the Travel Price Index and Components, November 1984

TPI Component	Monthly Percent Change October, 1984 to November, 1984	Annual Percent Change November, 1983 to November, 1984
Transportation	0.1	2.0
Airline Fares	0.4	5.5
Intercity Bus Fares	0.4	7.5
Intercity Train Fares	0.4	5.1
Taxicab Fares	0.1	2.2
Gasoline	- 0.3	- 2.4
Lodging	- 1.4	6.4
Food Away From Home	0.2	3.8
Entertainment Services	- 1.4	3.7
Incidentals	0.0	2.5
TRAVEL PRICE INDEX	- 0.3	3.7
CONSUMER PRICE INDEX	0.0	4.0

Source: U.S. Travel Data Center and U.S. Bureau of Labor Statistics

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research, 1899 L Street, N.W., Washington, DC 20036. Telephone number, (202) 293-1040. Dr. Douglas C. Frechtling, Director. Ida Simmons, Editor. ISSN: 0744-6233.

TRAVEL PRINTOUT reports on the results of Data Center projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are available for $45 per year, U.S., Canada and Mexico; other foreign countries, $55 per year, payable in U.S. funds only.

MEMBERS EVALUATE U.S. TRAVEL DATA CENTER SERVICES

In a recent survey, members declared the U.S. Travel Data Center's reports useful not only to members but to the travel industry as a whole.

The 89 full, limited, state and academic members who responded to the mailed questionnaire, over 60 percent of the Data Center's membership, ranked the Outlook for Travel and Tourism, Travel Printout, Economic Review of Travel in America and Impact of Travel on State Economies as the most valuable of the Data Center's publications.

Of those member respondents who have attended the annual Travel Outlook Forum, 94.5 percent believed it was valuable. Most would prefer a forum held in Washington in September, although although over 50 percent said they would be likely to attend regional meetings of the forum.

Approximately 73 percent of the respondents said they would be interested in attending seminars on how to use Data Center research.

A large majority of member respondents have direct access to a computer system that will communicate with other computers over telephone lines; however, only one-half expressed an interest in computer access to Data Center research.

Generally, members perceve Data Center dues and costs to about right. ##

DATA CENTER ENCOURAGES STATE AND FULL MEMBERS TO REVIEW BENEFITS

Some of the U.S. Travel Data Center's full and state members are not taking advantage of their membership benefits, according to Director Douglas C. Frechtling. "Full members can designate as many as four recipients of our reports," he said, "and may purchase additional copies at half price. State members can designate two recipients, and are entitled to the same discount."

Full and state members should review their records and contact Laura Goodin, assistant manager for information systems, at 202/293-1040 with any changes in their list of Data Center representatives. (These may be anyone in the member organization or an advertising account executive.) ##

WORKSHOP FOCUSES ON RESEARCH AS TRAVEL MARKETING TOOL

The U.S. Travel Data Center will join forces with the United States Travel and Tourism Administration (USTTA) and The George Washington University to present a travel marketing research workshop on February 7 and 8.

The workshop, which immediately follows USTTA's city-state days, will provide participants with information and techniques for the effective use of research and data in formulating marketing strategy. Participants will learn to adapt research to individual needs. Dr. Douglas C. Frechtling, director of the U.S. Travel Data Center, Suzanne Cook, its assistant director, and Dr. John Hunt, chairman of The George Washington University's travel and tourism program, will lead the workshop. Session topics will include: "Research Data as a Tool in Marketing Planning", "Identifying Data Sources for Use in Marketing Planning", "Problems of Accessing and Using Data" and "Deciding When It Is Necessary to Do Primary Research."

Participants will apply their new skills in collecting and using data to real-life situations simulated by case studies. On the second day of the workshop participants will present case study assignments for evaluation.

For more information or to register for the Travel Marketing Research Workshop, contact Nancy Chesworth Weir, Travel and Tourism Program,The George Washington University, 817 23rd Street NW, Washington, DC 20052, 202/676-7071. ##

States comprising the Census regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. MIDDLE ATLANTIC: New Jersey, New York, Pennsylvania. SOUTH EAST: Alabama, Delaware, Florida, Georgia, Kentucky, Maryland, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia. EAST NORTH CENTRAL: Indiana, Illinois, Michigan, Ohio, Wisconsin. WEST NORTH CENTRAL: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. WEST SOUTH CENTRAL: Arkansas, Louisiana, Oklahoma, Texas. MOUNTAIN: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. PACIFIC: Alaska, California, Hawaii, Oregon, Washington.

CURRENT TRAVEL INDICATORS

	October 1984	% Change from September 1984	% Change from October 1983	Year-to-date % change 1984/83
Establishment receipts or retail sales				
Hotels, motels and other lodging places(1)	$ 2,676 million	- 3.4	6.2	13.9
Eating and drinking places(2)	$10,409 million	- 2.1	2.9	7.1
Gasoline service stations(2)	$ 8,786 million	1.7	- 0.6	1.8
Commercial lodging demand				
Hotel/motel occupancy rate(3)	66.4 percent	- 0.4	- 0.3	1.6
Real demand for commercial lodging(4)	$ 1,000 million	- 2.3	- 0.3	5.1
Airline passenger traffic(5)				
Domestic revenue passenger-miles	16.4 billion	7.8	1.4	0.5
International revenue passenger-miles	4.9 billion	-12.4	6.2	10.1
Bus passenger traffic(6)				
Intercity bus passenger-miles	2.4 billion	3.0	1.3	- 2.0
Highway traffic volume(7)				
Rural arterial vehicle-miles	38.7 billion	1.3	4.0	5.3
Rail passenger traffic(8)				
Amtrak passenger-miles	322.6 million	- 2.5	6.0	6.2
Travel Price Index(9)	369.0	0.0	3.9	4.5
U.S. resident travel(10)				
Total person-trips	N/A	N/A	N/A	N/A
Vacation person-trips	N/A	N/A	N/A	N/A
Public use of national parks(11)				
Visits	20,560,013	-17.3	3.3	- 3.2
Overnight stays	882,332	-50.7	-14.9	10.1
Foreign arrivals in U.S.(12)				
From overseas	N/A	N/A	N/A	N/A
From Canada	734,455	-16.9	-13.1	- 8.7
U.S. citizen departures(12)				
To overseas	N/A	N/A	N/A	N/A
To Canada	739,965	-36.5	1.9	6.1
Domestic demand for motor gasoline(13)				
Barrels per day	6,709 thousand	- 0.3	1.6	0.2

(1)Source: Laventhol and Horwath, seasonally unadjusted. (2)Preliminary; adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3)Source: Laventhol and Horwath, seasonally adjusted. (4)Source: Laventhol and Horwath, unadjusted expenditures for commercial lodging adjusted for inflation since 1972. (5)Preliminary; U.S. scheduled service air carriers. Source: Civil Aeronautics Board. (6)All carriers regular route and charter service. Source: American Bus Association. (7)Source: Federal Highway Administration. (8)Source: National Railroad Passenger Corporation (Amtrak). (9)Source: U.S. Travel Data Center and Bureau of Labor Statistics. (10)Source: U.S. Travel Data Center. (11)Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12)Source: U.S. Travel and Tourism Administration and Nettleton Travel Research Center. (13)Preliminary; Source: U.S. Department of Energy.

U.S. Travel Data Center

1899
L Street
Northwest
Washington, D.C.
20036
(202) 293-1040

U.S. POSTAGE
PAID
FIRST CLASS
PERMIT NO. 45523
WASHINGTON, D.C.

January 1985

TRAVEL PRINTOUT

Research News for the U.S. Travel Industry

Jeanne Long
Congressional Information
Service
4520 East-West Hwy., Ste. 800
Bethesda MD 20814

3/11/85 R9375-1A

TRAVEL PRINTOUT

Supported by a grant from Travel Industry Association of America

Research News for the U.S. Travel Industry

U.S. Travel Data Center

February 1985 Volume 14, Number 2

1985 ECONOMIC OUTLOOK WILL ENCOURAGE TRAVEL

Continuing economic expansion in 1985, which will boost personal income, and relatively low rates of travel price inflation could encourage an increase in additional travel away from home, according to U.S. Travel Data Center Director Douglas C. Frechtling's article in the 1985 U.S. Industrial Outlook.

Dr. Frechtling listed several key factors which will determine the level of travel activity in 1985 and the travel industry's response:

1) Excess capacity on air and intercity bus carriers, offering the consumer greater choice and depressed prices, is likely to dampen industry earnings in these sectors.

2) Air traffic congestion, partially caused by the number of new airlines spawned by deregulation, results in added flights and fare cuts as airlines compete for market share. Such activity can encourage travel through highly publicized discount fares on popular routes.

3) If the dollar remains stable or weakens, additional personal income from the world economic recovery will encourage foreign residents to travel to the United States, while U.S. travel abroad will drop back to more moderate rates of growth. Should the dollar appreciate significantly in 1985, however, U.S. travel to foreign destinations will accelerate again, while foreign visitor flows to the United States will be constrained further.

4) The rate of economic expansion may slow in 1985, but consumer purchases of major durable goods should slow as well from the blistering pace of 1983-84, freeing up additional discretionary funds to finance leisure travel. As a consequence, travel spending in 1985 should rise somewhat faster than in 1984, boosting employment in the travel services industry by 2.5 percent.

5) Long-term economic, demographic and technological developments will reshape business and personal travel patterns, rather than alter the volume of travel during the next five years. Rising personal income and employment, increased discretionary income in many households, and rapid growth in the retired population and in the 35 to 49 age group (the prime travel years) indicate a strong travel industry projected to 1989.

6) Increased use of telecommunications systems, such as videoconferencing, could reduce the growth of business travel for certain purposes in the future. On the other hand, it is more

(Continued on page 3)

AIR TRANSPORT ASSOCIATION RELEASES STUDY OF AIR TRAVELERS

Seven out of every 10 adult Americans have flown on a commercial airline, and 27 percent flew during the last year, according to a Gallup study conducted recently for the Air Transport Association.

The "1984 Air Travel Survey", conducted during the past summer involving interviews with 4,571 adults, reports that out of the estimated total adult noninstitutional population of 169 million, approximately 118 million have flown at least once. Those who flew during the 12 months prior to the survey averaged 2.8 round trips each.

The survey states that 74 percent of men have flown on a commercial airplane, compared to 66 percent of women. More whites than non-whites have ever flown, and more people aged 25 to 49 fly

(Continued on page 3)

TRAVEL PRICES DECLINE IN DECEMBER

With the help of falling gasoline and lodging prices, the cost of travel in the U.S. dropped 0.3 percent in December, the second consecutive monthly decline in travel prices and the third decline in 1984, according to the U.S. Travel Data Center's monthly Travel Price Index (TPI).

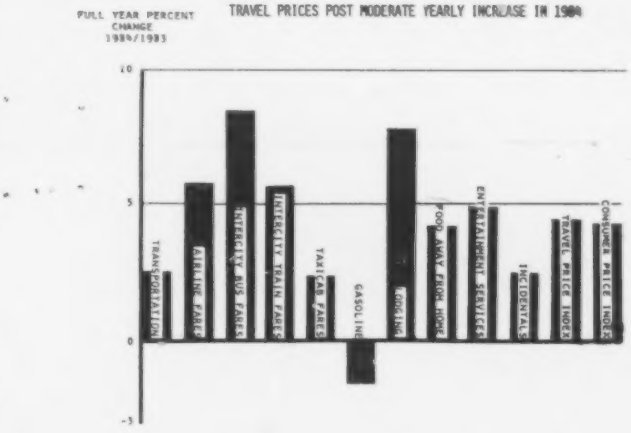
For comparison, the Consumer Price Index (CPI) increased by 0.1 percent on a seasonally unadjusted basis in December.

The TPI, which measures changes in the seasonally unadjusted cost of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in this country, fell to 366.8 in December (1967=100).

Lodging prices dropped the most, down 1.7 percent in December. Gasoline prices decreased 0.9 percent and incidentals dropped 0.3 percent.

The TPI has increased 4.1 percent since December 1983, slightly more than the 4.0 percent growth registered by the CPI during the same period. Intercity bus fares increased 12.3 percent, followed by airline fares, which rose 6.5 percent. Gasoline prices were the only component posting a decrease, down 2.5 percent from 12 months earlier.

For all of 1984, travel prices grew 4.4 percent over 1983. A 1.6 percent decline in gasoline prices, combined with slight increases in incidentals, contributed to the moderate yearly increase. Intercity bus fares posted the largest jump, 8.5 percent. ##



Monthly, Annual and Full Year Rates of Change in the Travel Price Index and Components, December 1984

TPI Component	Monthly Percent Change November 1984 to December 1984	Annual Percent Change December 1983 to December 1984	Full Year Percent Change 1984/1983
Transportation	- 0.2	2.6	2.5
Airline Fares	0.2	6.5	5.9
Intercity Bus Fares	1.9	2.3	8.5
Intercity Train Fares	1.2	4.7	5.7
Taxicab Fares	0.0	1.2	2.4
Gasoline	- 0.9	- 2.5	- 1.6
Lodging	- 1.7	6.3	7.8
Food Away From Home	0.4	4.2	4.2
Entertainment Services	2.4	5.7	5.0
Incidentals	- 0.3	2.7	2.5
TRAVEL PRICE INDEX	- 0.3	4.1	4.4
CONSUMER PRICE INDEX	0.1	4.0	4.3

Source: U.S. Travel Data Center and U.S. Bureau of Labor Statistics

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research, 1899 L Street, N.W., Washington, DC 20036. Telephone number, (202) 293-1040. Dr. Douglas C. Frechtling, Director; Ida Simmons, Editor. ISSN: 0744-6233.

TRAVEL PRINTOUT reports on the results of Data Center projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are available for $45 per year, U.S., Canada and Mexico; other foreign countries, $55 per year, payable in U.S. funds only.

TRAVEL INCREASES SLIGHTLY IN OCTOBER

Travel during October rose 2 percent over year-earlier levels, according to the U.S. Travel Data Center's latest National Travel Survey.

Following a 13 percent decrease in September, travel by Americans totaled 82 million person-trips in October 1984, up from 81 million one year earlier. (A person-trip is measured each time anyone goes 100 miles or more away from home.)

The monthly telephone survey reported that vacation travel made a comeback after falling below 1983 levels for three consecutive months, surging 25 percent over October 1983. Weekend travel grew for the first time since June 1983, posting a 15 percent increase.

Pleasure travel declined for the fourth month in a row, however, down nearly 4 percent below the level recorded in October 1983. Travel for business or convention purposes recorded the smallest growth, rising only 5 percent.

While travel party size increased slightly, the average number of nights spent away from home declined from 5.0 nights in October 1983 to 4.4 nights in 1984. The average round-trip distance declined as well, from 800 to 720 miles.

The number of adults planning a vacation trip in the next six months increased 10 percent from last year, while those undecided about their future vacation plans fell 8 percent.

Forty-four percent plan to use commercial lodging, while 41 percent indicated plans to stay with friends or relatives. However, the average duration of these intended vacation trips fell to 8.0 nights, down from 8.9 nights recorded in 1983.

While the number of Americans planning to vacation in destinations outside the United States continued to increase, plans to visit the Frontier West also showed strong growth. ##

OUTLOOK
(CONTINUED FROM PAGE 1)

likely that these systems will give businesses additional flexibility in choosing new locations for national and regional headquarters operations. To the extent that firms locate these facilities farther from established population and business centers, travel could actually expand.

7) The growing competition for consumer leisure time represented by various home entertainment, communication and computer systems may have mixed consequences for travel. These home leisure-time options might reduce U.S. weekend travel but stimulate longer vacation trips.

The 1985 U.S. Industrial Outlook is available for $15.00 from the Government Printing Office, Documents Department, Washington, DC 20402. ##

AIR TRAVELERS
(CONTINUED FROM PAGE 1)

than those in other age groups.

The incidence of having ever flown is directly related to income: 88 percent of people with annual incomes of $40,000 or over have flown, while 78 percent of those with annual incomes of $20,000-$39,999 and 63 percent with annual incomes of $10,000-$19,999 have flown.

Of U.S. adults who have flown in the last 12 months, 91 percent flew within the United States, 10 percent to Mexico or the Caribbean, 6 percent to Canada and 13 percent to other international destinations.

Eighty-one percent of travelers flying during the last 12 months listed pleasure or personal reasons as trip purpose, while 34 percent listed business reasons.

The "1984 Air Travel Survey" is available for $25.00 by writing to the Economics and Finance Department, Air Transport Association, 1709 New York Avenue NW, Washington, DC 20006. ##

States comprising the Census regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. **MIDDLE ATLANTIC:** New Jersey, New York, Pennsylvania. **SOUTH EAST:** Alabama, Delaware, Florida, Georgia, Kentucky, Maryland, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia. **EAST NORTH CENTRAL:** Indiana, Illinois, Michigan, Ohio, Wisconsin. **WEST NORTH CENTRAL:** Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. **WEST SOUTH CENTRAL:** Arkansas, Louisiana, Oklahoma, Texas. **MOUNTAIN:** Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. **PACIFIC:** Alaska, California, Hawaii, Oregon, Washington.

CURRENT TRAVEL INDICATORS

	November 1984	% Change from October 1984	% Change from November 1983	Year-to-date % change 1984/83
Establishment receipts or retail sales				
Hotels, motels and other lodging places(1)	$ 2,616 million	- 9.0	5.9	15.1
Eating and drinking places(2)	$10,238 million	- 2.7	7.6	7.3
Gasoline service stations(2)	$ 8,761 million	- 1.4	2.3	1.9
Commercial lodging demand				
Hotel/motel occupancy rate(3)	65.5 percent	- 1.3	1.5	1.5
Real demand for commercial lodging(4)	$ 918 million	- 0.2	- 0.5	4.6
Airline passenger traffic(5)				
Domestic revenue passenger-miles	15.6 billion	0.1	10.1	0.1
International revenue passenger-miles	3.9 billion	-10.6	12.1	10.2
Bus passenger traffic(6)				
Intercity bus passenger-miles	1.8 billion	-25.7	- 1.7	- 1.9
Highway traffic volume(7)				
Rural arterial vehicle-miles	36.5 billion	- 5.4	5.8	5.3
Rail passenger traffic(8)				
Amtrak passenger-miles	338.0 million	4.8	- 0.5	5.6
Travel Price Index(9)	307.8	- 0.3	3.7	4.4
U.S. resident travel(10)				
Total person-trips	N/A	N/A	N/A	N/A
Vacation person-trips	N/A	N/A	N/A	N/A
Public use of national parks(11)				
Visits	14,139,083 *	-31.1	11.2	- 2.4
Overnight stays	548,756	-37.8	- 2.3	10.0
Foreign arrivals to U.S.(12)				
From overseas	N/A	N/A	N/A	N/A
From Canada	642,190	-19.1	- 7.5	- 8.7
U.S. citizen departures(12)				
To overseas	N/A	N/A	N/A	N/A
To Canada	473,038	-36.1	7.8	8.1
Domestic demand for motor gasoline(13)				
Barrels per day	6,700 thousand	- 0.3	1.6	0.2

(1)Source: Laventhol and Horwath, seasonally unadjusted. (2)Preliminary; adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3)Source: Laventhol and Horwath, seasonally adjusted. (4)Source: Laventhol and Horwath, unadjusted expenditures for commercial lodging adjusted for inflation since 1972. (5)Preliminary; U.S. scheduled service air carriers. Source: Civil Aeronautics Board. (6)All carriers regular route and charter service. Source: American Bus Association. (7)Source: Federal Highway Administration. (8)Source: National Railroad Passenger Corporation (Amtrak). (9)Source: U.S. Travel Data Center and Bureau of Labor Statistics. (10)Source: U.S. Travel Data Center. (11)Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12)Source: U.S. Travel and Tourism Administration and Nettleton Travel Research Center. (13)Preliminary; Source: U.S. Department of Energy.

U.S. Travel Data Center

1899
L Street
Northwest
Washington, D.C.
20036
(202) 293-1040

U.S. POSTAGE
PAID
FIRST CLASS
PERMIT NO. 45523
WASHINGTON, D.C.

February 1985

TRAVEL PRINTOUT

Research News for the U.S. Travel Industry

Jeanne Long
Congressional Information
Service
4520 East-West Hwy., Ste. 800
Bethesda, MD 20814

4/1/85 F RG375-1

TRAVEL PRINTOUT

Supported by a grant from Travel Industry Association of America

Research News for the U.S. Travel Industry

U.S. Travel Data Center

March 1985 Volume 14, Number 3

LACKLUSTER 1984 DOMESTIC TRAVEL MARKET DISAPPOINTS INDUSTRY

The travel business is good, but not as good as it should be in the strong economic recovery, according to U.S. Travel Data Center Director Dr. Douglas C. Frechtling.

In an address to the Wertheim Lodging Conference in February, Dr. Frechtling said that travel industry sales in 1984 grew 9.7 percent, with the demand for travel goods and services slackening at midyear from the boom rates of earlier months. This growth rate was 1 percent slower than that for the gross national product, making 1984 the first time in three years that travel sales have not outpaced the GNP. This appears to be the product of relatively low travel price inflation and limited growth in real travel activity.

Trip volume fell 5 percent in 1984 to 842 million person-trips, according to the U.S. Travel Data Center's monthly National Travel Survey. This is considerably worse than the 1 percent drop in 1983 and is the third year in a row that total U.S. person-trips have fallen. (A person-trip is measured each time anyone goes 100 miles or more away from home.)

In contrast, vacation travel, which comprises about two-thirds of all person-trips, rose 7 percent in 1984, and travel for business and convention purposes rose more than 6 percent.

U.S. consumers have allocated increasing portions of their additional recovery-produced dollars to purchasing automobiles and major household items postponed during the previous recessions. These dollars, totaling $100 billion a year for the last two years, would have financed increased leisure travel in more normal economic recoveries.

"Future travel sales growth for individual companies will come from astute marketing rather than from dramatic growth in overall demand," commented Dr. Frechtling.

The unusual strength of the dollar abroad also contributes to restraints on the domestic travel business: more American travel dollars are spent abroad while fewer foreign travel dollars flow in. The result, stated Dr. Frechtling, is "a lackluster domestic travel market, growing more slowly than the overall economy and producing mediocre employment growth.

"While much of the travel industry recognized that pent-up demand for consumer durables and historically-strong dollar exchange rates would restrain domestic travel spending for a time in the new recovery," Dr. Frechtling concluded, "none of us anticipated the transition back to 'normal' consumption patterns would last so long." ##

FOREIGN VISITORS CONTRIBUTE OVER 12% OF 1983 U.S. TOURISM RECEIPTS

Tax revenues generated by 21.7 million foreign visitors' tourism spending totaled over $1.6 billion in 1983, more than 12 percent of total tourism tax revenues, according to a report to be released soon by the U.S. Travel and Tourism Administration.

The study, for which the U.S. Travel Data Center prepared state-by-state estimates of travel-generated payroll and tax revenues, showed that the fed-

1983 INTERNATIONAL TOURISM RECEIPTS
TOP TEN STATES

State	Receipts (millions)	Percent of Total Receipts
Florida	$ 2,650	19%
California	2,630	19
New York	1,570	11
Hawaii	1,170	9
Texas	1,110	8
Arizona	350	3
Nevada	310	2
Washington, D.C.	290	2
Massachusetts	270	2
Illinois	230	2

(Continued on page 3)

TRAVEL PRICES POST MODERATE RISE IN JANUARY

Declining gasoline prices helped hold down the rise in travel prices in January to 0.1 percent, according to the U.S. Travel Data Center's Travel Price Index (TPI).

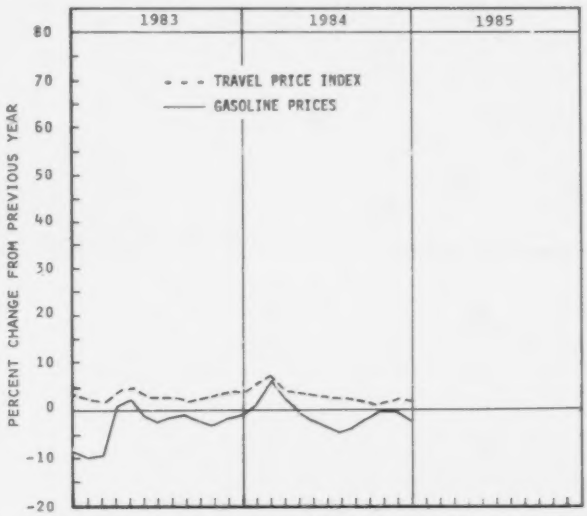
The TPI outperformed the Consumer Price Index (CPI) as the latter grew 0.2 percent on a seasonally unadjusted basis in January.

The TPI, which measures changes in the seasonally unadjusted cost of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in this country, stood at 367.3 in January (1967=100).

Gasoline prices decreased 2.4 percent from the previous month to lead all TPI components in price decline. Incidentals prices fell 0.7 percent, the only other travel-related costs to decline in January.

On the other hand, the cost of lodging while out of town jumped 1.4 percent and bus fares increased 0.9 percent over the previous month. Taxicab and airplane fares increased 0.7 and 0.6 percent, respectively.

Since January 1984 gasoline prices have fallen 3.6 percent. Intercity bus fares increased the most over this period--8.1 percent--followed by airplane fares, up 6.6 percent. The cost of lodging while out of town rose less than 5 percent, and the cost of entertainment services rose 6 percent. ##



FALLING GASOLINE PRICES CONTINUE TO MODERATE TRAVEL PRICES

Monthly and Annual Rates of Change in the Travel Price Index and Components, January 1985

TPI Component	Monthly Percent Change December 1984 to January 1985	Annual Percent Change January 1984 to January 1985
Transportation	- 0.7	2.1
Airline Fares	0.6	6.6
Intercity Bus Fares	0.9	8.1
Intercity Train Fares	0.5	4.4
Taxicab Fares	0.7	1.7
Gasoline	- 2.4	3.6
Lodging	1.4	4.9
Food Away From Home	0.2	3.9
Entertainment Services	0.6	6.0
Incidentals	- 0.7	2.6
TRAVEL PRICE INDEX	0.1	3.4
CONSUMER PRICE INDEX	0.2	3.6

Source: U.S. Travel Data Center and U.S. Bureau of Labor Statistics

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research, 1899 L Street, N.W., Washington, DC 20036. Telephone number, (202) 293-1040. Dr. Douglas C. Frechtling, Director. Ida Simmons, Editor. ISSN: 0744-6233.

TRAVEL PRINTOUT reports on the results of Data Center projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are available for $49 per year, U.S., Canada and Mexico; other foreign countries, $59 per year, payable in U.S. funds only.

TRAVEL DECLINES SLIGHTLY IN NOVEMBER

Travel during November declined less than 1 percent from year-earlier levels, according to the U.S. Travel Data Center's latest National Travel Survey results.

Following a 2 percent increase in October, travel by Americans fell from 92.8 million person-trips in November 1983 to 91.8 million a year later. (A person-trip is measured each time anyone goes 100 miles or more away from home.)

The monthly telephone survey reported that vacation travel continued the surge registered in October of this year, rising 26 percent from one year earlier. However, weekend travel, despite strong increases in October, dropped 11 percent.

Pleasure travel, such as visiting friends or relatives, sightseeing or other entertainment purposes, halted its four-month decline with a gain of 1 percent over the previous year. Business/convention travel, however, fell 2 percent.

The average trip duration rose to 5.3 nights in November 1984 from 4.7 nights one year earlier. Round trip distance grew from 800 to 870 miles.

The South had the greatest number of November visitors and posted a 14 percent increase over November 1983 levels. Great Lakes Country travel continued its strong growth, posting a 15 percent rise, the fastest growth rate of any region.

The number of U.S. adults planning vacation trips in the next six months following November (December 1984 through May 1985) increased 4 percent over the previous year. Those undecided about vacation plans also rose sharply.

Of those planning a trip, 53 percent said they would travel by personal motor vehicle, a 2 percent increase over 1983 levels, while 40 percent planned to travel by air, an increase of 15 percent. Forty-four percent plan to use commercial lodging, while 35 percent intend to stay with friends or relatives. ##

DATA CENTER UPDATES TRAVELTAB

The first estimates of travel and its impact for 1984 will appear in "TravelTab 85", a six-panel brochure answering the most frequently-asked questions about the travel industry, to be released around April 30 by the Data Center.

The pocket guide to the travel industry will be available in bulk quantities to organizations which would like to distribute it to members in observance of National Tourism Week. The cost is $50.00 plus 25 cents each, and orders must be received by April 15 to be included in the first printing.

For more information or to place an order, contact Ida Simmons at the U.S. Travel Data Center, 202/293-1040. ##

VISITORS (CONTINUED FROM PAGE 1)

eral government received $854 million in tax receipts from foreign visitors, while $599 million went to state governments and $203 million to local governments.

Foreign visitors' spending generated 312,800 American jobs in 1983, or one job per 37 overseas visitors. Foreign tourism directly generated over 63 thousand jobs in Florida, more than in any other state, followed by California, New York, Hawaii and Texas.

Foreign visitors spent 28 percent of their travel dollars on lodging, and purchases/incidentals accounted for a further 27 percent. Nineteen percent of expenditures were for foodservice, 15 percent were for domestic transportation and 11 percent were for entertainment.

For more information on the USTTA study The Economic Impact of Foreign Visitor Spending, which analyzes foreign visitor spending by country of residence, trip purpose and impact on payroll, employment and tax receipts on the national, regional and state levels, contact Don Wynegar, director, U.S. Travel and Tourism Administration, U.S. Department of Commerce, Room 1516, Washington, DC 20230. ##

2908-26

States comprising the travel regions are:

NORTHEAST: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont, New York, New Jersey, Delaware, District of Columbia, Maryland, Pennsylvania, Virginia, West Virginia. SOUTH: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee. GREAT LAKES COUNTRY: Illinois, Indiana, Iowa, Michigan, Minnesota, Ohio, Wisconsin. MOUNTAIN WEST: Colorado, Montana, Nebraska, North Dakota, South Dakota, Utah, Wyoming. FRONTIER WEST: Arizona, Kansas, Missouri, New Mexico, Oklahoma, Texas. FAR WEST: Alaska, California, Hawaii, Idaho, Nevada, Oregon, Washington.

CURRENT TRAVEL INDICATORS

	December 1984	% Change from November 1984	% Change from December 1983	Year-to-date % change 1984/83
Establishment receipts or retail sales				
Hotels, motels and other lodging places(1)	N/A	N/A	N/A	N/A
Eating and drinking places(2)	$10,667 million	0.1	9.8	7.8
Gasoline service stations(2)	$ 8,554 million	- 1.8	- 2.3	1.4
Commercial lodging demand				
Hotel/motel occupancy rate(3)	66.8 percent	1.9	- 1.0	1.2
Real demand for commercial lodging(4)	N/A	N/A	N/A	N/A
Airline passenger traffic(5)				
Domestic revenue passenger-miles	15.5 billion	- 0.4	1.9	0.3
International revenue passenger-miles	3.3 billion	-16.7	-13.9	8.5
Bus passenger traffic(6)				
Intercity bus passenger-miles	1.8 billion	4.5	1.1	- 1.7
Highway traffic volume(7)				
Rural arterial vehicle-miles	35.6 billion	- 2.6	8.7	5.6
Rail passenger traffic(8)				
Amtrak passenger-miles	396.9 million	17.4	- 0.4	5.1
Travel Price Index(9)	366.8	- 0.3	4.1	4.4
U.S. resident travel(10)				
Total person-trips	N/A	N/A	N/A	N/A
Vacation person-trips	N/A	N/A	N/A	N/A
Public use of national parks(11)				
Visits	10,855,051	-23.3	28.4	- 1.4
Overnight stays	346,659	-36.8	11.3	9.7
Foreign arrivals in U.S.(12)				
From overseas	N/A	N/A	N/A	N/A
From Canada	588,939	- 8.3	- 4.9	- 8.5
U.S. citizen departures(12)				
To overseas	N/A	N/A	N/A	N/A
To Canada	451,832	- 4.5	10.4	6.3
Domestic demand for motor gasoline(13)				
Barrels per day	6,580 thousand	- 3.3	- 3.9	- 0.1

(1)Source: Laventhol and Horwath, seasonally unadjusted. (2)Preliminary; adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3)Source: Laventhol and Horwath, seasonally adjusted. (4)Source: Laventhol and Horwath, unadjusted expenditures for commercial lodging adjusted for inflation since 1972. (5)Preliminary; U.S. scheduled service air carriers. Source: Civil Aeronautics Board. (6)All carriers regular route and charter service. Source: American Bus Association. (7)Source: Federal Highway Administration. (8)Source: National Railroad Passenger Corporation (Amtrak). (9)Source: U.S. Travel Data Center and Bureau of Labor Statistics. (10)Source: U.S. Travel Data Center. (11)Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12)Source: U.S. Travel and Tourism Administration and Nettleton Travel Research Center. (13)Preliminary; Source: U.S. Department of Energy.

U.S. Travel Data Center
1899 L Street Northwest
Washington, D.C. 20036
(202) 293-1040

U.S. POSTAGE
PAID
FIRST CLASS
PERMIT NO. 45523
WASHINGTON, D.C.

March 1985

TRAVEL PRINTOUT

Research News for the U.S. Travel Industry

Jeanne Long
Congressional Information Service
4520 East-West Hwy., Ste. 800
Bethesda MD 20814

R9375-1

TRAVEL PRINTOUT

Supported by a grant from Travel Industry Association of America

Research News for the U.S. Travel Industry

U.S. Travel Data Center

April 1985 Volume 14, Number 4

THIRD QUARTER 1984 TRAVEL DECLINES 7 PERCENT FROM PREVIOUS YEAR

As the strong dollar and massive trade deficits inhibited economic growth during the third quarter of 1984, travel by Americans fell 7 percent from levels measured during the same quarter of 1983, according to the U.S. Travel Data Center's 1984 National Travel Survey Third Quarter Report.

The monthly telephone survey reported U.S. residents took 338 million person-trips during July, August and September 1984, traditionally the most popular period for American travel. (A person-trip is measured each time anyone goes 100 miles or more away from home.)

PERCENT DISTRIBUTION OF TOTAL PERSON-TRIPS
BY DESTINATION REGION, THIRD QUARTER 1984
OUTSIDE US: 6%
TOTAL: 337.5 MILLION PERSON-TRIPS

While travel both to visit friends and relatives and to attend a business meeting or convention increased, a 22 percent decline in travel for "other pleasure" such as sightseeing, entertainment and recreation caused the overall decline in third quarter travel.

Vacation travel declined 4 percent, and those vacationers who traveled cut both their length of stay and trip distance slightly.

Travel by personal motor vehicle, which accounted for 82 percent of travel during the third quarter of 1984, decreased 7 percent from third quarter 1983. Thirteen percent of all travel was by air. The number of travelers lodging in hotels or motels rose less than 1 percent, and those staying with friends or relatives increased 5 percent.

Monthly Average Number and Percent of U.S. Adults Taking Trips
Third Quarter 1984 and 1983

Trip Characteristics	U.S. Adults (Millions) 1984	U.S. Adults (Millions) 1983	Percent of U.S. Adults 1984	Percent of U.S. Adults 1983
Total population	172.5	170.1	100%	100%
Took one or more trips	53.4	51.0	30	30
Purpose of trip				
Visit friends/relatives	18.4	17.8	10	10
Other pleasure	18.6	24.4	11	14
Business/convention	9.0	6.4	5	4
Mode of Transport				
Auto/truck/RV	38.5	43.9	22	25
Air	7.6	8.4	4	5
Vacation Trip	32.6	38.5	19	21
Weekend Trip	24.0	21.4	14	13

Source: U.S. Travel Data Center

The South was the most popular destination region, attracting 24 percent of all third quarter travel. However, the region hosted only 81 million visitors, 1.5 percent more than in 1983, trailing Eastern Gateway and Great Lakes Country, which attracted 8 percent and 3 per cent more visitors for the period respectively.

The 1984 National Travel Survey Third Quarter Report will be sent to Data Center members and is avaliable to others for $65.00 prepaid from the U.S. Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036. ##

TRAVEL PRICES INCREASE SLIGHTLY IN FEBRUARY

Gasoline prices continued to fall for the fourth straight month, holding the rise in travel prices to just 0.2 percent in February, according to the U.S. Travel Data Center's Travel Price Index (TPI).

The TPI grew more slowly than the prices of all consumer goods as measured by the Consumer Price Index (CPI). The CPI grew 0.4 percent in February.

The TPI, which measures changes in the seasonally unadjusted cost of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in this country, rose to 368.0, its highest point since last October (1967=100).

Airline and intercity railroad fares remained unchanged in February; moreover, gasoline prices declined 1.5 percent from the previous month. Intercity bus fares dropped 0.7 percent, and the cost of entertainment services decreased 0.1 percent.

The cost of lodging while out of town rose 1.3 percent, representing the largest increase of all TPI components. Incidental prices rose 0.6 percent, and taxicab fares grew 0.5 percent over the previous month.

The TPI has risen by only 3.3 percent since February 1984, slowed by a 4.7 percent decrease in gasoline prices during this period. In the past 12 months, airline fares have advanced 6.8 percent, followed by intercity bus fares, up 6.6 percent. The cost of entertainment services has risen 5.4 percent, while all other TPI components posted increases no greater than 5 percent over the previous year. ##

FALLING GASOLINE PRICES HELD DOWN TRANSPORTATION COSTS

Monthly and Annual Rates of Change in the Travel Price Index and Components, February 1985

TPI Component	Monthly Percent Change January 1985 to February 1985	Annual Percent Change February 1984 to February 1985
Transportation	- 0.7	1.6
Airline Fares	0.0	6.8
Intercity Bus Fares	- 0.7	6.6
Intercity Train Fares	0.0	4.5
Taxicab Fares	0.5	2.2
Gasoline	- 1.5	- 4.7
Lodging	1.3	5.0
Food Away From Home	0.4	3.9
Entertainment Services	- 0.1	5.4
Incidentals	0.6	2.9
TRAVEL PRICE INDEX	0.2	3.3
CONSUMER PRICE INDEX	0.4	3.5

Source: U.S. Travel Data Center and U.S. Bureau of Labor Statistics

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research, 1899 L Street, N.W., Washington, DC 20036. Telephone number, (202) 293-1040. Dr. Douglas C. Frechtling, Director. Ida Simmons, Editor. ISSN: 0744-6233.

TRAVEL PRINTOUT reports on the results of Data Center projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are available for $49 per year, U.S., Canada and Mexico; other foreign countries, $59 per year, payable in U.S. funds only.

TRAVEL DECLINES IN DECEMBER

Travel during December fell 3 percent from year-earlier levels, according to the U.S. Travel Data Center's latest National Travel Survey results.

Following a slight decline in November, travel by Americans fell from 80 million person-trips in December 1983 to 78 million a year later. (A person-trip is measured each time anyone goes 100 miles or more away from home.)

The monthly telephone survey reported that vacation travel dropped 1 percent from the level set in December 1983.

Pleasure travel, such as visiting friends or relatives, sightseeing or other entertainment purposes, declined 13 percent from the previous year and posted the lowest yearly total since 1980, 734 million person-trips. On the other hand, business/convention travel increased 4 percent over year-earlier levels.

The average trip duration rose to 5.9 nights in December 1984 from 4.6 nights one year earlier. Round trip distance increased from 760 to 880 miles.

Travel by air increased 11 percent; however, travel by personal motor vehicle in December fell 7 percent from year-earlier levels.

Great Lakes Country had the greatest number of December visitors and posted an 18 percent increase over December 1983 levels. The Frontier West, however, showed the fastest growth rate among all regions.

The number of U.S. adults planning vacation trips in the next six months (January through June 1985) increased 6 percent over the previous year. Those undecided about vacation plans also rose significantly.

Of those planning a trip, 50 percent said they would travel by personal motor vehicle, a 3 percent decrease from 1983 levels, while 40 percent plan to travel by air, an increase of 15 percent. Forty-five percent plan to use commercial lodging, and 31 percent intend to stay with friends or relatives.

Plans to travel to the Frontier West showed the strongest increases, while intentions to travel to destions in Great Lakes Country fell sharply. ##

U.S. TRAVEL DATA CENTER OFFERS FREE 1985 PROGRAM GUIDE

The U.S. Travel Data Center last week released details of its 1985 research program in its 1985 Guide to Programs, Membership and Publications. The 30-page guide also describes the Data Center's past and current publications and membership benefits.

Among the reports which the Data Center will publish in 1985, the guide lists the 1985 Outlook for Travel and Tourism, TravelTab (a quick reference guide to current travel trends), and quarterly and annual reports from the 1985 National Travel Survey, the continuing survey of travel activity by U.S. residents now in its seventh year.

The U.S. Travel Data Center's research program and reports are valuable for both short- and long-range planning and marketing in the travel industry and for identifying tourism market developments, the econonic impact of travel, and trends affecting future travel activity.

The Data Center, which has developed a national reputation for increasing the recognition of the economic importance of travel away from home and improving the understanding of changing travel markets, will send a free 1985 Guide to Programs, Membership and Publications upon request. Address requests to the U.S. Travel Data Center, 1899 L Street NW, Washington, DC 20036. ##

States comprising the travel regions are:

NORTHEAST: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont, New York, New Jersey, Delaware, District of Columbia, Maryland, Pennsylvania, Virginia, West Virginia. SOUTH: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee. GREAT LAKES COUNTRY: Illinois, Indiana, Iowa, Michigan, Minnesota, Ohio, Wisconsin. MOUNTAIN WEST: Colorado, Montana, Nebraska, North Dakota, South Dakota, Utah, Wyoming. FRONTIER WEST: Arizona, Kansas, Missouri, New Mexico, Oklahoma, Texas. FAR WEST: Alaska, California, Hawaii, Idaho, Nevada, Oregon, Washington.

CURRENT TRAVEL INDICATORS

	January 1985	% Change from December 1984	% Change from January 1984	Year-to-date % change 1985/84
Establishment receipts or retail sales				
Hotels, motels and other lodging places(1)	N/A	N/A	N/A	N/A
Eating and drinking places(2)	$10,532 million	- 0.8	3.9	3.9
Gasoline service stations(2)	$ 8,318 million	0.2	- 1.8	- 1.8
Commercial lodging demand				
Hotel/motel occupancy rate(3)	64.1 percent	- 4.1	- 1.8	- 1.8
Real demand for commercial lodging(4)	N/A	N/A	N/A	N/A
Airline passenger traffic(5)				
Domestic revenue passenger-miles	16.6 billion	- 2.9	14.8	14.8
International revenue passenger-miles	4.1 billion	- 3.5	- 3.3	- 3.3
Bus passenger traffic(6)				
Intercity bus passenger-miles	1.3 billion	-28.2	- 3.6	- 3.6
Highway traffic volume(7)				
Rural arterial vehicle-miles	30.4 billion	-12.5	2.0	2.0
Rail passenger traffic(8)				
Amtrak passenger-miles	320.9 million	-19.1	4.3	4.3
Travel Price Index(9)	368.0	0.2	3.6	3.6
U.S. resident travel(10)				
Total person-trips	N/A	N/A	N/A	N/A
Vacation person-trips	N/A	N/A	N/A	N/A
Public use of national parks(11)				
Visits	8,752,086	-19.4	4.7	4.7
Overnight stays	386,332	6.3	0.9	0.9
Foreign arrivals in U.S.(12)				
From overseas	N/A	N/A	N/A	N/A
From Canada	693,316	17.7	2.8	2.8
U.S. citizen departures(12)				
To overseas	N/A	N/A	N/A	N/A
To Canada	308,503	-31.7	- 6.0	- 6.0
Domestic demand for motor gasoline(13)				
Barrels per day	6,336 thousand	- 3.7	1.1	1.1

(1)Source: Laventhol and Horwath, seasonally unadjusted. (2)Preliminary; adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3)Source: Laventhol and Horwath, seasonally adjusted. (4)Source: Laventhol and Horwath, unadjusted expenditures for commercial lodging adjusted for inflation since 1972. (5)Preliminary; U.S. scheduled service air carriers. Source: Civil Aeronautics Board. (6)All carriers regular route and charter service. Source: American Bus Association. (7)Source: Federal Highway Administration. (8)Source: National Railroad Passenger Corporation (Amtrak). (9)Source: U.S. Travel Data Center and Bureau of Labor Statistics. (10)Source: U.S. Travel Data Center. (11)Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12)Source: U.S. Travel and Tourism Administration and Nettleton Travel Research Center. (13)Preliminary; Source: U.S. Department of Energy.

U.S. Travel Data Center

1899
L Street
Northwest
Washington, D.C.
20036
(202) 293-1040

April 1985

U.S. POSTAGE
PAID
FIRST CLASS
PERMIT NO. 45523
WASHINGTON, D.C.

TRAVEL PRINTOUT

Research News for the U.S. Travel Industry

Jeanne Long
Congressional Information
Service
4520 East-West Hwy., Ste. 800
Bethesda MD 20814

HBS R 9375-1

TRAVEL PRINTOUT

Supported by a grant from Travel Industry Association of America

U.S. Travel Data Center

Research News for the U.S. Travel Industry

May 1985 Volume 14, Number 5

DATA CENTER FORECASTS INCREASE IN SUMMER VACATION TRAVEL

The U.S. Travel Data Center projects U.S. vacation travel will increase 5 percent this summer over last year's levels.

Summer vacation trips will reach their highest level in four years, according to the non-profit research center's report, 1985 Outlook for Summer Travel: A Guide to Vacation Markets.

The summer forecast is based upon interviews with more than 4,000 U.S. adults gathered by the Data Center's monthly National Travel Survey.

The Data Center predicts vacationers will take 282 million person-trips and spend 1.7 billion nights away from home in June, July and August 1985. (A person-trip is counted each time one person travels 100 miles or more away from home.)

Ocean beaches have increased the most in popularity among summer vacation planners this year, and more than one-third of vacationers are budgeting more for travel this year than last.

1985 PROJECTED SUMMER VACATION PERSON-TRIPS: REGION OF DESTINATION (MILLIONS)

The Data Center projects 84 percent of summer vacationers will travel by car, truck or recreational vehicle, and 12 percent by air.

Among the regions, the seven states of the Great Lakes area will generate the most summer vacation travelers. Residents of the Far West, however, will increase their summer travel by 11 percent this year, more than any other region. The South will again draw the most summer visitors.

Taking advantage of favorable exchange rates, U.S. vacation travelers to foreign destinations should top 8.9 million this summer, up 5 percent from the summer of 1984. Prospective U.S. vacationers think Europe offers more travel bargains than any other foreign area.

"Consumers have satisfied their demand for major durable goods postponed during the last recession, goods which

(Continued on page 3)

FORUM HIGHLIGHTS OUTLOOK FOR GROWTH IN TRAVEL MARKETS

Guided by the theme, "Uncovering Opportunities in a Dynamic Travel Market," the U.S. Travel Data Center's eleventh annual Travel Outlook Forum, co-sponsored by the Travel and Tourism Research Association, will help participants discern growing travel markets and develop strategies for success in the coming year.

The forum, to be held on September 20, 1985, in conjunction with the Travel Industry Association's National Conference and Showcase, at the New Orleans Hilton Riverside and Towers, will feature Dr. Richard T. Curtin, director of the highly acclaimed Surveys of Consumer Attitudes for the Survey Research Center of the University of Michigan. Curtin, a recognized authority on behavioral economics, conducts continuing research on current trends in consumer attitudes and expectations, including consumer

(Continued on page 3)

TRAVEL PRICES JUMP IN MARCH

Gasoline prices soared in March, raising travel prices by 1.1 percent, the largest increase in eight months, according to the U.S. Travel Data Center's Travel Price Index (TPI).

For comparison, the cost of consumer goods as measured by the Consumer Price Index (CPI) grew 0.4 percent in March.

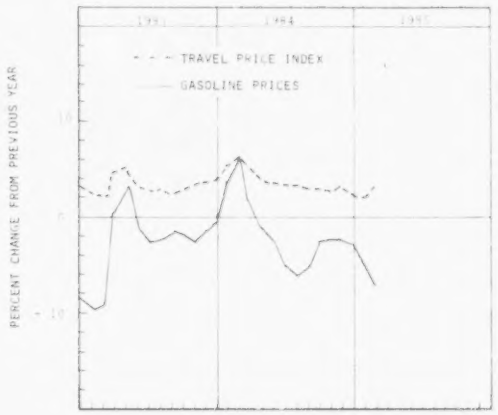
The TPI, which measures changes in the seasonally unadjusted cost of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in this country, climbed to 372.1 in March (1967=100).

Gasoline prices posted their largest gain in more than 22 months, up 2.4 percent. The cost of lodging while out of town rose 1.6 percent and airline fares grew 1.2 percent.

Intercity railroad fares were unchanged for the second consecutive month.

Only two TPI components decreased in March: the cost of entertainment, down 1.7 percent, and intercity bus fares, down 0.5 percent from February.

The TPI has risen 4.1 percent since March 1984, slowed by a 6.9 percent decrease in gasoline prices, while the CPI has increased 3.7 percent during this period. At the same time, airline fares have jumped 8.2 percent, followed by a rise in intercity bus fares of 6.3 percent. The cost of lodging while out of town has advanced 5.8 percent over the past 12 months, and all other TPI components have increased less than 5 percent since March 1984. ##



DESPITE A MONTHLY RISE, GASOLINE PRICES REMAIN BELOW YEAR-EARLIER LEVELS

Monthly and Annual Rates of Change in the Travel Price Index and Components, March 1985

TPI Component	Monthly Percent Change February, 1984 to March, 1984	Annual Percent Change March, 1984 to March, 1985
Transportation	1.6	1.2
Airline Fares	1.2	8.2
Intercity Bus Fares	- 0.5	6.3
Intercity Train Fares	0.0	4.5
Taxicab Fares	0.8	2.9
Gasoline	2.4	- 6.9
Lodging	1.6	5.8
Food Away From Home	0.4	3.9
Entertainment Services	- 1.7	3.3
Incidentals	0.9	3.2
TRAVEL PRICE INDEX	1.1	4.1
CONSUMER PRICE INDEX	0.4	3.7

Source: U.S. Travel Data Center and U.S. Bureau of Labor Statistics

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research, 1899 L Street, N.W., Washington, DC 20036. Telephone number, (202) 293-1040. Dr. Douglas C. Frechtling, Director. Ida Simmons, Editor. ISSN: 0744-6233.

TRAVEL PRINTOUT reports on the results of Data Center projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are available for $49 per year, U.S., Canada and Mexico; other foreign countries, $59 per year, payable in U.S. funds only.

TRAVEL DECLINES SLIGHTLY IN FOURTH QUARTER 1984

Fourth quarter travel by Americans in 1984 fell less than 1 percent from levels measured during the same quarter of 1983, according to the U.S. Travel Data Center's 1984 National Travel Survey Fourth Quarter Report.

The monthly telephone survey reported U.S. residents took 252 million person-trips during October, November and December 1984. (A person-trip is measured each time one person goes 100 miles or more away from home.)

While travel to visit friends and relatives increased 6 percent and to attend a business meeting or convention increased 2 percent, a 20 percent decline in travel for "other pleasure" such as sightseeing, entertainment and recreation caused the slight overall decline in fourth quarter travel.

Vacation travel increased 16 percent, and those vacationers who traveled increased round-trip distance slightly (830 miles compared to 820 for the same period in 1983) and cut their length of stay from 6.5 nights in fourth quarter 1983 to 5.9 nights.

Travel by personal motor vehicle, which accounted for 73 percent of travel during the fourth quarter of 1984, decreased 4 percent from fourth quarter 1983. Twenty-two percent of all travel was by air.

The National Travel Survey Fourth Quarter Report will be sent to members and is available for $65.00 prepaid from the U.S. Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036. ##

SUMMER (CONTINUED FROM PAGE 1)

have competed with tourism for discretionary dollars," commented Dr. Douglas C. Frechtling, director of the U.S. Travel Data Center. "This development, combined with the continuing favorable economic climate, should foster more vacation travel growth than during any summer since 1981."

The complete forecast, 1985 Outlook for Summer Travel: A Guide to Vacation Markets, has been sent to full members and is available to others for $60.00 prepaid from the U.S. Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036. ##

FORUM HIGHLIGHTS TRAVEL MARKET GROWTH (CONTINUED FROM PAGE 1)

intentions to purchase or rent recreational vehicles.

Curtin, who also addressed the 1983 Travel Outlook Forum, will speak on consumer attitudes and spending behavior.

Respected travel industry experts will discuss the outlook for international travel markets, business travel, family vacation markets, lodging and foodservice, auto travel, the retired vacation market and other vital sectors of the travel industry.

Tom Davidson, principal and chief executive officer of Davidson-Peterson Associates, a national marketing research firm specializing in travel and tourism, will discuss family vacation travel markets. Davidson has developed and written tourism marketing plans for Georgia, Iowa and Montana.

The forum registration fee for members of the Data Center, the Travel Industry Association or the Travel and Tourism Research Association is $175, and the combined fee for both the National Conference and Showcase and the forum is $375.

The Travel Industry Association is the national non-profit trade association representing all components of the travel and tourism industry.

The Travel and Tourism Research Association is the international association of travel research and marketing professionals.

For more information, contact Ida Simmons, 202/293-1040, or write, U.S. Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036. ##

States comprising the travel regions are:

NORTHEAST: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont, New York, New Jersey, Delaware, District of Columbia, Maryland, Pennsylvania, Virginia, West Virginia. SOUTH: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee. GREAT LAKES COUNTRY: Illinois, Indiana, Iowa, Michigan, Minnesota, Ohio, Wisconsin. MOUNTAIN WEST: Colorado, Montana, Nebraska, North Dakota, South Dakota, Utah, Wyoming. FRONTIER WEST: Arizona, Kansas, Missouri, New Mexico, Oklahoma, Texas. FAR WEST: Alaska, California, Hawaii, Idaho, Nevada, Oregon, Washington.

CURRENT TRAVEL INDICATORS

	February 1985	% Change from January 1985	% Change from February 1984	Year-to-date % change 1985/84
Establishment receipts or retail sales				
Hotels, motels and other lodging places(1)	N/A	N/A	N/A	N/A
Eating and drinking places(2)	$10,741 million	2.1	5.9	4.8
Gasoline service stations(2)	$ 8,200 million	- 1.8	- 1.7	- 1.6
Commercial lodging demand				
Hotel/motel occupancy rate(3)	64.2 percent	0.2	- 0.9	- 1.3
Real demand for commercial lodging(4)	N/A	N/A	N/A	N/A
Airline passenger traffic(5)				
Domestic revenue passenger-miles	15.6 billion	- 5.9	12.6	13.7
International revenue passenger-miles	3.4 billion	-16.8	6.4	0.8
Bus passenger traffic(6)				
Intercity bus passenger-miles	N/A	N/A	N/A	N/A
Highway traffic volume(7)				
Rural arterial vehicle-miles	28,845 billion	- 5.2	1.8	1.9
Rail passenger traffic(8)				
Amtrak passenger-miles	293.3 million	- 8.6	0.8	2.6
Travel Price Index(9)	368.0	0.2	3.3	3.4
U.S. resident travel(10)				
Total person-trips	N/A	N/A	N/A	N/A
Vacation person-trips	N/A	N/A	N/A	N/A
Public use of national parks(11)				
Visits	10,082,387	15.2	2.8	3.7
Overnight stays	434,333	17.9	- 7.8	- 4.0
Foreign arrivals in U.S.(12)				
From overseas	N/A	N/A	N/A	N/A
From Canada	603,727	-12.9	- 7.7	- 2.4
U.S. citizen departures(12)				
To overseas	N/A	N/A	N/A	N/A
To Canada	360,721	16.9	- 5.9	- 5.9
Domestic demand for motor gasoline(13)				
Barrels per day	6,521 thousand	2.9	4.6	2.8

(1)Source: Laventhol and Horwath, seasonally unadjusted. (2)Preliminary; adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3)Source: Laventhol and Horwath, seasonally adjusted. (4)Source: Laventhol and Horwath, unadjusted expenditures for commercial lodging adjusted for inflation since 1972. (5)Preliminary; U.S. scheduled service air carriers. Source: Civil Aeronautics Board. (6)All carriers regular route and charter service. Source: American Bus Association. (7)Source: Federal Highway Administration. (8)Source: National Railroad Passenger Corporation (Amtrak). (9)Source: U.S. Travel Data Center and Bureau of Labor Statistics. (10)Source: U.S. Travel Data Center. (11)Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12)Source: U.S. Travel and Tourism Administration and Nettleton Travel Research Center. (13)Preliminary; Source: U.S. Department of Energy.

U.S. Travel Data Center

1899
L Street
Northwest
Washington, D.C.
20036
(202) 293-1040

May 1985

U.S. POSTAGE
PAID
FIRST CLASS
PERMIT NO. 8523
WASHINGTON, D.C.

TRAVEL PRINTOUT

Research News for the U.S. Travel Industry

R9375-1

TRAVEL PRINTOUT

Supported by a grant from Travel Industry Association of America

Research News for the U.S. Travel Industry

U.S. Travel Data Center

June 1985 Volume 14, Number 6

TRAVEL SPENDING INCREASED 6% IN 1983

U.S. and foreign travelers' spending on travel in the United States increased 6 percent in 1983, according to estimates released in a report by the U.S. Travel Data Center.

The report, Impact of Travel on State Economies, 1983, the sixth in this unique series of annual estimates of spending on travel away from home, shows that travel spending grew in 42 states, with New Jersey posting the largest gain, 17 percent. Travel spending remained unchanged from the previous year in one state, and fell in seven others.

Travel spending in the U.S. totaled $210 billion in 1983 and directly supported 4.8 million jobs, paying $47 billion in wage and salary income. Travel expenditures also generated $24 billion in tax revenue for federal, state and local governments.

Top 10 States--Total Domestic and Foreign Visitors' Travel Expenditures, 1983

State	Expenditures ($ billions)
California	$ 28.6
Florida	19.3
New York	15.2
Texas	14.6
New Jersey	8.6
Pennsylvania	7.5
Nevada	6.3
Illinois	5.9
Ohio	5.9
Michigan	5.5

California garnered more of U.S. traveler dollars than any other state: nearly $26 billion. Florida followed in second place with more than $16 billion. Rhode Island received $340 million, fewer travel dollars than any other state.

(Continued on page 3)

TRAVEL OUTLOOK FORUM WILL EXAMINE RETIRED TRAVELER TRENDS

Over-55 and retired American travelers will be one of the dynamic travel markets covered by the U.S. Travel Data Center's eleventh annual Travel Outlook Forum on September 20, 1985, at the New Orleans Hilton Riverside and Towers.

The forum, a premier industry event since 1975, will be held in conjunction with the Travel Industry Association's National Conference and Showcase.

Adhering to the theme, "Uncovering Opportunities in a Dynamic Travel Market," the forum will feature Bob Forbes, director of the Special Services Department of the American Association of Retired Persons (AARP), who will discuss opportunities for marketing travel to retired Americans.

Combining his experience with AARP and statistical data from the U.S. Travel Data Center's National Travel Survey, Forbes will present mature traveler trends and preferences and the myths and realities of the "grey market."

Forbes, who has fifteen years' experience in the travel industry, oversees AARP Travel Service, Motoring Plan and Purchase Privilege Program. He has developed and expanded a comprehensive network of travel services for AARP members, including a member discount program reaching into many travel industry sectors.

For more information about the Travel Outlook Forum, contact Ida Simmons, U.S. Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036, or call 202/293-1040. ##

TRAVEL PRICES ACCELERATE IN APRIL

Soaring gasoline prices raised the cost of travel in April by 1.4 percent, the largest increase in two years, according to the U.S. Travel Data Center's Travel Price Index (TPI).

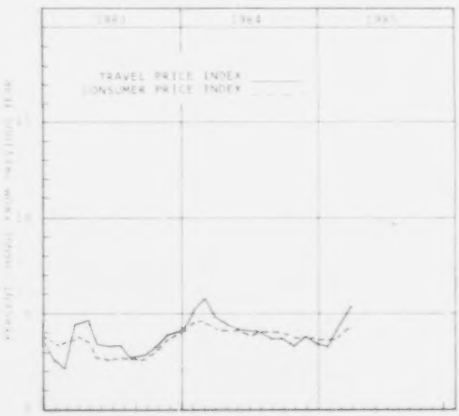
For comparison, the cost of consumer goods as measured by the Consumer Price Index (CPI) grew 0.4 percent in April.

The TPI, which measures changes in the seasonally unadjusted cost of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in this country, jumped to 377.4 in April (1967=100).

Gasoline prices posted their largest gain in two years, up 3.8 percent. The cost of entertainment services rose 2.7 percent, and the prices of lodging while out of town climbed 1.8 percent.

Intercity railroad fares were unchanged in April, the third consecutive month of steady intercity railroad fares. Only one TPI component decreased in April: intercity bus fares fell 0.2 percent.

The TPI has risen 5.6 percent since April 1984, slowed by a 3.3 percent decrease in gasoline prices, while the CPI has increased 4.2 percent during this period. Over this period, airline fares have jumped 8.7 percent, followed by a 7.7 percent rise in lodging prices. Intercity bus fares and the cost of entertainment services each have increased 6.1 percent over the previous year.



APRIL TRAVEL PRICES POST SHARP INCREASE OVER CONSUMER PRICES

Monthly and Annual Rates of Change in the Travel Price Index and Components, April 1985

TPI Component	Monthly Percent Change March 1985 to April 1985	Annual Percent Change April 1984 to April 1985
Transportation	1.8	3.0
Airline Fares	0.4	8.7
Intercity Bus Fares	- 0.2	6.1
Intercity Train Fares	0.0	4.5
Taxicab Fares	0.0	2.9
Gasoline	3.8	- 3.3
Lodging	1.8	7.7
Food Away From Home	0.4	4.3
Entertainment Services	2.7	6.1
Incidentals	0.3	3.6
TRAVEL PRICE INDEX	1.4	5.6
CONSUMER PRICE INDEX	0.4	4.2

Source: U.S. Travel Data Center and U.S. Bureau of Labor Statistics

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research, 1899 L Street, N.W., Washington, DC 20036. Telephone number, (202) 293-1040. Dr. Douglas C. Frechtling, Director. Ida Simmons, Editor. ISSN: 0744-6233.

TRAVEL PRINTOUT reports on the results of Data Center projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are available for $49 per year, U.S., Canada and Mexico; other foreign countries, $59 per year, payable in U.S. funds only.

FOREIGN VISITOR SPENDING BENEFITS EVERY STATE, STUDY SHOWS

Foreign visitor expenditures touched every state in the nation in 1983, ranging from $2.7 billion in Florida to $5.8 million in Delaware.

However, the spending was highly concentrated: five states (Florida, California, New York, Hawaii, Texas) garnered two-thirds of the total.

The first state-by-state estimates of foreign visitor spending and its impact on employment, payroll and tax revenue based on large visitor surveys are contained in a study prepared by the U.S. Travel Data Center for the U.S. Travel and Tourism Administration of the U.S. Department of Commerce.

The study, Impact of Foreign Visitors on State Economies, 1983, found that foreign visitor spending directly generated 313,000 jobs in the U.S. paying $3.1 billion in 1983. Federal, state and local tax revenue directly generated by this spending topped $1.6 billion.

Among U.S. Census regions, the greatest impact occurred in the Pacific region with 30 percent of the total, followed by the South East.

Over half of the spending occurred on personal trips, such as vacationing and visiting friends and relatives. Business/convention travelers accounted for 28 percent of foreign spending in the U.S. in 1983.

The 81-page Impact of Foreign Visitors on State Economies, 1983 contains tables and narrative providing estimates of foreign visitor spending and its impact by state, destination region, type of expenditure, area of residence and type of trip. It will be sent to full members of the Data Center and is available to others for $30.00 prepaid from the U.S. Travel Data Center, 1899 L Street NW, Washington, DC 20036. ##

National Travel Survey Results
(omitted from May Travel Printout)

	Jan 1985 (millions)	% Change 1985/1984
Total person-trips	61	13.0%
Vaca. person-trips	41	25.3
Total person-nights	250	- 5.5
Vaca. person-nights	181	- 4.9

Source: U.S. Travel Data Center

(CONTINUED FROM PAGE 1)

The jobs generated by 1983 expenditures made travel and tourism the largest private employer in 12 states and among the top three in 41 states.

The 60-page report, Impact of Travel on State Economies, 1983, is the sixth annual study of travel's contribution to each state's employment, income and tax revenue, detailing changes in economic impact by state and major industry component. For the first time, state-by-state estimates also show the impact of both U.S. residents' and foreign visitors' travel spending. The report will be sent to members and is available to others for $55.00 prepaid from the U.S. Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036. ##

EDITOR'S NOTE

A disturbing development in recent years is the continuing decline in the number and timeliness of monthly indicators of travel activity. Most recently, the American Bus Association discontinued its series on intercity bus passenger-miles, a Current Travel Indicators feature for many years. Moreover, Travel Printout readers have seen an increase in the number of "N/A's" on the CTI page as sources fell behind the table's three-month margin.

In order to cover monthly travel measurements as comprehensively as possible, we have changed the CTI format to include the most recent data available for 21 series on travel and the travel industry regardless of month. Readers will always have the most recent reading available, although the months may vary among the series.

We hope this form of CTI will prove more useful than the growing number of empty cells. ##

States comprising the Census regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. MIDDLE ATLANTIC: New Jersey, New York, Pennsylvania. SOUTH EAST: Alabama, Delaware, Florida, Georgia, Kentucky, Maryland, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia. EAST NORTH CENTRAL: Indiana, Illinois, Michigan, Ohio, Wisconsin. WEST NORTH CENTRAL: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. WEST SOUTH CENTRAL: Arkansas, Louisiana, Oklahoma, Texas. MOUNTAIN: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. PACIFIC: Alaska, California, Hawaii, Oregon, Washington.

CURRENT TRAVEL INDICATORS

	Current Month	Current Value	Percent Change From Previous Month	Percent Change From Year-ago Month	Percent Change Year-to-date 1985/84
Establishment receipts or retail sales					
Hotels, motels and other lodging places(1)		N/A	N/A	N/A	N/A
Eating and drinking places(2)	Mar	$10,666 million	0.5	6.0	4.8
Gasoline service stations(2)	Mar	$ 8,365 million	3.1	- 2.8	- 2.3
Commercial lodging demand					
Hotel/motel occupancy rate(3)	Mar	65.1 percent	1.4	1.1	- 1.3
Real demand for commercial lodging(4)		N/A	N/A	N/A	N/A
Airline passenger traffic(5)					
Domestic revenue passenger-miles	Mar	20.5 billion	31.4	21.8	16.7
International revenue passenger-miles	Mar	4.3 billion	26.9	6.9	3.0
Highway traffic volume(6)					
Rural arterial vehicle-miles	Mar	36.4 billion	26.3	5.8	2.8
Rail passenger traffic(7)					
Amtrak passenger-miles	Mar	376.4 million	28.3	- 0.4	1.4
Travel Price Index(8)	Mar	372.1	1.1	1.1	3.6
U.S. resident travel(9)					
Total person-trips	Feb	43.9 million	-28.0	- 3.1	5.6
Vacation person-trips	Feb	24.6 million	-40.1	1.7	15.3
Total person-nights	Feb	237.0 million	- 5.2	- 9.8	- 7.6
Vacation person-nights	Feb	162.4 million	-10.2	-10.5	- 7.7
Public use of national parks(10)					
Visits	Mar	15,260,152	51.4	16.2	8.9
Overnight stays	Mar	646,208	48.8	2.9	- 1.0
Foreign arrivals in U.S.(11)					
From overseas	Feb	565,339	-14.4	7.7	5.9
From Canada	Mar	946,681	56.8	- 8.4	- 5.0
U.S. citizen departures(11)					
To overseas	Feb	869,856	- 8.4	- 1.4	2.1
To Canada	Mar	453,023	25.6	8.4	- 0.6
Domestic demand for motor gasoline(12)					
Barrels per day	Mar	6,533 thousand	0.2	0.3	2.0

N/A = not available

(1)Source: Laventhol and Horwath, seasonally unadjusted. (2)Preliminary: adjusted for seasonal variation and trading-day differences. Source: Bureau of the Census. (3)Source: Laventhol and Horwath, seasonally adjusted. (4)Source: Laventhol and Horwath, unadjusted expenditures for commercial lodging adjusted for inflation since 1972. (5)Preliminary; U.S. scheduled service air carriers. Source: U.S. Department of Transportation. (6)Source: Federal Highway Administration. (7)Source: National Railroad Passenger Corporation (Amtrak). (8)Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9)Source: U.S. Travel Data Center. (10)Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (11)Source: Statistics Canada and Nettleton Travel Research Center. (12)Preliminary; Source: U.S. Department of Energy.

U.S. Travel Data Center

1899
L Street
Northwest
Washington, D.C.
20036
(202) 293-1040

U.S. POSTAGE
PAID
FIRST CLASS
PERMIT NO. 8523
WASHINGTON, D.C.

June 1985

TRAVEL PRINTOUT

Research News for the U.S. Travel Industry

Jeanne Long
Congressional Information
Service
4520 East-West Hwy., Ste. 800
Bethesda MD 20814

8/19/85 R9375-1

TRAVEL PRINTOUT

Supported by a grant from Travel Industry Association of America

Research News for the U.S. Travel Industry

U.S. Travel Data Center

July 1985 Volume 14, Number 7

NOTED FUTURIST TO ADDRESS TRAVEL OUTLOOK FORUM

Noted futurist Joseph F. Coates will examine the impact of emerging technology, demographic trends and global integration on the future of travel and tourism at the U.S. Travel Data Center's eleventh annual Travel Outlook Forum, September 20, 1985 at the New Orleans Hilton Riverside and Towers.

Coates, president of a policy research organization specializing in research management, policy analysis and technology assessment, will provide the luncheon address at the forum. He is former head of exploratory research for the Congressional Office of Technology Assessment, is the author of over 100 articles, papers and publications and holds 19 patents.

The Travel Outlook Forum, for eleven years the travel industry's annual forecasting conference, will again be co-sponsored by the Travel and Tourism Research Association (TTRA). For the second year, the forum will be held in conjunction with the Travel Industry National Conference & Marketing Showcase, sponsored by the Travel Industry Association of America (TIA).

Registration fee for the forum is $175 for TTRA, TIA and Data Center members, and $200 for others. Special discounts for attending both the forum and the Conference & Showcase are also available.

The Travel and Tourism Research Association is the international association of travel research and marketing professionals. The Travel Industry Association is the national nonprofit trade association representing all components of the travel and tourism industry.

For more information about the Travel Outlook Forum, contact Ida Simmons, U.S. Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036, or call 202/293-1040. ##

U.S. TRAVEL DATA CENTER NAMES MARKETING COUNSEL

Dr. Douglas C. Frechtling, director of the U.S. Travel Data Center, named Hershel Sarbin Associates, Inc., as marketing counsel for the U.S. Travel Data Center.

In this capacity, Hershel Sarbin Associates will assist in the formulation, marketing and analysis of the Data Center's survey research on travel markets.

In announcing this affiliation, Dr. Frechtling stated, "The marketing and analytical capabilities of Hershel Sarbin Associates admirably complements the Data Center's unique travel market survey programs. I believe this relationship will markedly improve the Data Center's ability to meet the research needs of the travel and tourism industry."

Hershel Sarbin Associates, Inc., a management consulting firm specializing in travel and leisure, provides marketing and management counsel to the travel industry. In this capacity, the firm has advised numerous businesses and government agencies on travel marketing issues. ##

TRAVEL PRICES ADVANCE IN MAY

Soaring lodging and gasoline prices raised the cost of travel in May by 1.0 percent according to the U.S. Travel Data Center's Travel Price Index (TPI).

For comparison, the cost of consumer goods as measured by the Consumer Price Index (CPI) grew 0.4 percent in May.

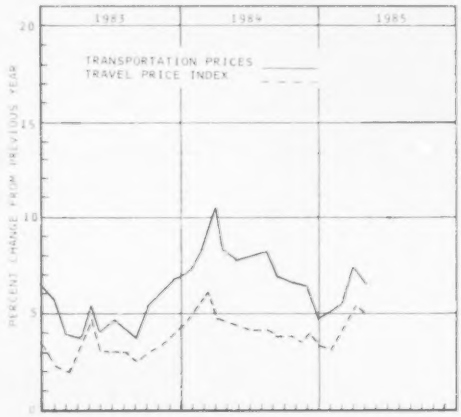
The TPI, which measures changes in the seasonally unadjusted cost of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in this country, rose to 381.4 in May (1967=100).

The cost of lodging while out of town jumped 2.1 percent over the previous month followed by a rise in gasoline prices of 2.0 percent. Intercity bus fares increased 0.6 percent.

After three months of steady prices, intercity railroad fares dropped 0.8 percent, and the cost of incidental items fell 0.1 percent. Taxicab fares were unchanged for the second straight month.

The TPI has risen 5.0 percent since May 1984, slowed by a 4.1 percent decrease in gasoline prices, while the CPI has increased 3.7 percent during this period.

Airline fares have increased 7.6 percent over the previous year. The costs of lodging, entertainment commodities, and intercity bus fares have posted increases greater than 6 percent since May of last year. ##



Monthly and Annual Rates of Change in the Travel Price Index and Components, May 1985

TPI Component	Monthly Percent Change April 1985 to May 1985	Annual Percent Change May 1984 to May 1985
Transportation	0.9	2.1
Airline Fares	0.1	7.6
Intercity Bus Fares	0.6	6.2
Intercity Train Fares	- 0.8	3.6
Taxicab Fares	0.0	2.7
Gasoline	2.0	- 4.1
Lodging	2.1	6.8
Food Away From Home	0.3	3.8
Entertainment Services	0.3	6.5
Incidentals	- 0.1	3.0
TRAVEL PRICE INDEX	1.0	5.0
CONSUMER PRICE INDEX	0.4	3.7

Source: U.S. Travel Data Center and U.S. Bureau of Labor Statistics

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research, 1899 L Street, N.W., Washington, DC 20036. Telephone number, (202) 293-1040. Dr. Douglas C. Frechtling, Director. Ida Simmons, Editor. ISSN: 0744-6233.

TRAVEL PRINTOUT reports on the results of Data Center projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are available for $49 per year, U.S., Canada and Mexico; other foreign countries, $59 per year, payable in U.S. funds only.

TRAVEL BY AMERICANS DROPS SLIGHTLY IN FEBRUARY

Travel during February fell 3 percent below year-earlier levels, according to the U.S. Travel Data Center's latest National Travel Survey results.

Following a 13.0 percent leap in January, travel by Americans totaled 43.9 million person-trips in February 1985, down from 45.3 million one year earlier. (A person-trip is measured each time anyone goes 100 miles or more away from home.)

The monthly telephone survey reported that vacation travel grew 2 percent over that for February 1984. Travel for business or convention purposes posted the largest increase of any travel component for the month, with a gain of 20 percent. Weekend travel, after strong increases in January, posted a moderate rise of 5 percent. On the negative side, travel for personal/family business and "other" purposes fell sharply.

Travel by auto/truck/RV declined, while air travel rose substantially over 1984 levels.

Average round-trip distance increased from 920 miles one year ago to 990 in February 1985; however, average trip duration fell slightly, from 5.8 nights to 5.4 nights away from home.

The survey also showed vacation travel intentions for the next six months (March through August 1985) increased 4 percent over February 1984. Of those planning a vacation trip, 57 percent intend to travel by personal motor vehicle, and 30 percent said they would travel by air.

Plans to use commercial lodging increased 20 percent and comprised 43 percent of the total, while the number of travelers planning to stay with friends and relatives declined 5 percent. The average duration of these intended vacation trips is 8.4 nights, down from 9.1 nights in February 1984. ##

BRIEFS

Bob LeBlanc, former chairman of the U.S. Travel Data Center and assistant secretary for tourism in the Louisiana Department of Culture, Recreation and Tourism, received the French National Order of Merit on July 13.

LeBlanc received the award for [redacted] years' work with the France-Louisiane Association, a Paris-based organization which seeks to enhance the image of both France and Louisiana and to perpetuate French history, heritage and language.

"This is without question one of the highlights of my career," LeBlanc said in reference to being a recipient of the Order. "I could not accept it, however, without doing so on behalf of the Louisiana Office of Tourism staff who certainly share this great honor with me along with so many other people who have played significant roles in my life."

The National Order of Merit is given for distinguished merit either in civil or military office or for special services rendered in private enterprises. ##

The U.S. Travel Data Center will release a detailed description of research services specially developed for state travel offices next month.

Travel Marketing and Impact Studies Especially for State Travel Offices, a 25-page guide to taking advantage of the Data Center's special research services and unique capabilities, features a new service: the advertising conversion study. This study, designed to measure the effectiveness of a state's travel advertising program, combines telephone surveys and economic studies to provide a measure of the impact and cost-effectiveness of travel promotion activites.

Travel Marketing and Impact Studies will be mailed to directors of state travel offices. For further information, call Ida Simmons, the Data Center's manager of communications, 202/293-1040. ##

States comprising the Census regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. MIDDLE ATLANTIC: New Jersey, New York, Pennsylvania. SOUTH EAST: Alabama, Delaware, Florida, Georgia, Kentucky, Maryland, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia. EAST NORTH CENTRAL: Indiana, Illinois, Michigan, Ohio, Wisconsin. WEST NORTH CENTRAL: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. WEST SOUTH CENTRAL: Arkansas, Louisiana, Oklahoma, Texas. MOUNTAIN: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. PACIFIC: Alaska, California, Hawaii, Oregon, Washington.

CURRENT TRAVEL INDICATORS

	Current Month	Current Value	Percent Change From Previous Month	Percent Change From Year-ago Month	Percent Change Year-to-date 1985/84
Establishment receipts or retail sales					
Hotels, motels and other lodging places(1)		N/A	N/A	N/A	N/A
Eating and drinking places(2)	Apr	$10,669 million	- 0.9	4.8	5.1
Gasoline service stations(2)	Apr	$ 8,693 million	3.0	0.9	- 1.3
Commercial lodging demand					
Hotel/motel occupancy rate(3)	Apr	70.7 percent	8.6	- 0.5	- 0.9
Real demand for commercial lodging(4)		N/A	N/A	N/A	N/A
Airline passenger traffic(5)					
Domestic revenue passenger-miles	Apr	16.4 billion	-20.1	- 1.4	9.4
International revenue passenger-miles	Apr	7.3 billion	70.3	76.9	26.4
Highway traffic volume(6)					
Rural arterial vehicle-miles	Apr	37.5 billion	2.6	4.6	3.4
Rail passenger traffic(7)					
Amtrak passenger-miles	Apr	399.6 million	6.2	9.9	3.7
Travel Price Index(8)	Apr	377.4	1.4	4.5	3.8
U.S. resident travel(9)					
Total person-trips	Mar	67.2 million	53.1	27.5	13.2
Vacation person-trips	Mar	41.7 million	69.5	16.2	15.6
Total person-nights	Mar	349.4 million	47.4	30.0	5.1
Vacation person-nights	Mar	233.5 million	43.8	12.2	- 0.6
Public use of national parks(10)					
Visits	Apr	21,252,176	39.3	25.9	14.9
Overnight stays	Apr	915,938	41.7	12.1	3.7
Foreign arrivals in U.S.(11)					
From overseas	Mar	718,376	27.1	16.2	7.4
From Canada	Apr	923,885	- 2.4	-13.8	- 7.7
U.S. citizen departures(11)					
To overseas	Mar	1,149,107	32.1	6.2	3.7
To Canada	Apr	569,375	25.7	1.6	0.1
Domestic demand for motor gasoline(12)					
Barrels per day	Apr	6,931 thousand	4.6	-3.7	2.7

N/A = not available

(1)Source: Laventhol and Horwath, seasonally unadjusted. (2)Preliminary; adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3)Source: Laventhol and Horwath, seasonally adjusted. (4)Source: Laventhol and Horwath, unadjusted expenditures for commercial lodging adjusted for inflation since 1972. (5)Preliminary; U.S. scheduled service air carriers. Source: U.S. Department of Transportation. (6)Source: Federal Highway Administration. (7)Source: National Railroad Passenger Corporation (Amtrak). (8)Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9)Source: U.S. Travel Data Center. (10)Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (11)Source: Statistics Canada and Nettleton Travel Research Center. (12)Preliminary; Source: U.S. Department of Energy.

U.S. Travel Data Center

1899
L Street
Northwest
Washington, D.C.
20036
(202) 293-1040

U.S. POSTAGE
PAID
FIRST CLASS
PERMIT NO. 8523
WASHINGTON, D.C.

July 1985

TRAVEL PRINTOUT

Research News for the U.S. Travel Industry

Jeanne Long
Congressional Information
Service
4520 East-West Hwy., Ste. 800
Bethesda MD 20814

9/5/25 R9375-1

TRAVEL PRINTOUT

Supported by a grant from Travel Industry Association of America

U.S. Travel Data Center

Research News for the U.S. Travel Industry

August 1985 Volume 14, Number 8

1984 TRAVEL VOLUME FAILS TO SURPASS YEAR-EARLIER LEVELS

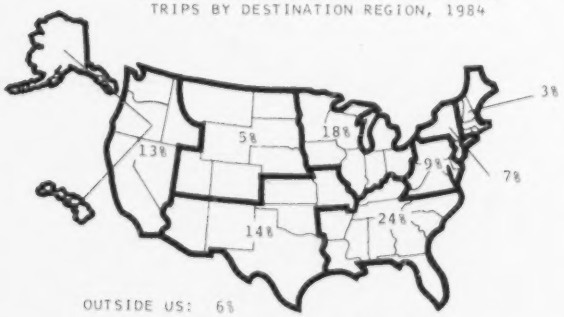
Although both vacation and business/convention travel rose in 1984, travel overall fell 4 percent from 1983 levels, according to the U.S. Travel Data Center's 1984 National Travel Survey Full Year Report.

The report, which summarizes results of the Data Center's monthly National Travel Survey conducted in 1984, reveals that 69 percent of all Americans traveled away from home in 1984, producing 1.01 billion person-trips. (A person-trip is measured each time anyone goes 100 miles or more away from home.)

With the exception of May and October, travel by Americans did not exceed the 1983 levels; however, vacation travel grew 7 percent in 1984, after a 3 percent decline the previous year.

While business/convention travel rose 7 percent, travel for "other pleasure" such as outdoor recreation, sightseeing and entertainment, fell 13 percent. Travel to visit friends and relatives remained unchanged from 1983.

PERCENT DISTRIBUTION OF TOTAL PERSON-TRIPS BY DESTINATION REGION, 1984



OUTSIDE US: 6%

TOTAL: 1,012.0 MILLION PERSON-TRIPS

Travel by air increased its market share from 16 percent of total travel in 1983 to 17 percent. However, travel by auto/truck/RV dropped 6 percent.

The South was the most popular region for American travelers, as in the previous two years, capturing 24 percent of the 1984 U.S. travel market. Travel to the Eastern Gateway grew the most in 1984, up 11 percent. The greatest number of travelers came from the Great Lakes Country, which produced 24 percent of all travelers, followed by The South, which generated 20 percent.

The 1984 National Travel Survey Full Year Report is based on telephone interviews with over 1,500 adult Americans each month in 1984. It includes over 100 pages of tables, charts, analysis and comparisons with 1983. It has been sent to Data Center members and is available to others for $100.00 prepaid from the U.S. Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036. ##

TRAVEL OUTLOOK FORUM WILL EXAMINE BUSINESS TRAVELER MARKET

Experts from several sectors of the travel industry will join the U.S. Travel Data Center's eleventh annual Travel Outlook Forum to discuss opportunities for growth in the business traveler market on September 20, 1985, at the New Orleans Hilton Riverside and Towers.

Hershel B. Sarbin, marketing consultant for the Data Center and chairman of Hershel Sarbin Associates, Inc., will moderate the panel of three travel industry experts who will present the prospects for growth in business travel from the airline and hotel perspectives as well as from the broad industry viewpoint.

Panelists include Joseph P. Sullivan, divisional vice president--marketing and advertising of National Car Rental System; Jennifer Armstrong, manager of market research for Trans World Airlines; and Valerie Dow, associate publisher of the Hotel and Motel Red Book.

(Continued on page 3)

PRICES EXPAND IN JUNE

Soaring lodging prices raised the cost of travel in June by 0.8 percent according to the U.S. Travel Data Center's Travel Price Index (TPI).

For comparison, the cost of consumer goods as measured by the Consumer Price Index (CPI) grew 0.3 percent in June.

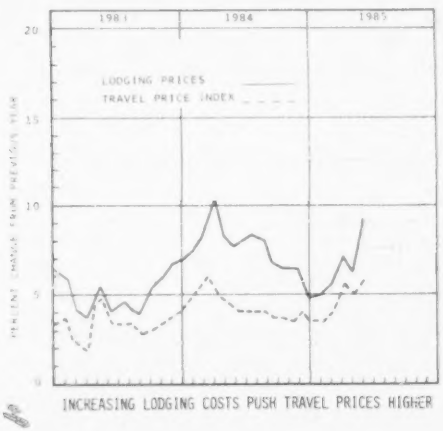
The TPI, which measures changes in the seasonally unadjusted cost of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in this country, climbed to 384.5 in June (1967=100).

The cost of lodging while out of town jumped 1.7 percent over the previous month. The costs of gasoline and entertainment services each gained 0.8 percent. Intercity train fares rose 0.7 precent, the first increase in five months.

The prices of incidental items remained unchanged in June.

The TPI has grown 5.9 percent since June 1984, compared to a 4.1 percent increase in the CPI.

Lodging prices gained the most, up 9.0 percent over the previous year, followed by a 7.6 percent increase in intercity bus fares. Railroad fares grew the least, 2.2 percent. ##



INCREASING LODGING COSTS PUSH TRAVEL PRICES HIGHER

Monthly and Annual Rates of Change in the Travel Price Index and Components, June 1985

TPI Component	Monthly Percent Change May 1985 to June 1985	Annual Percent Change June 1984 to June 1985
Transportation	0.5	4.4
Airline Fares	0.2	5.8
Intercity Bus Fares	0.5	7.6
Intercity Train Fares	0.7	2.2
Taxicab Fares	0.3	2.7
Gasoline	0.8	2.6
Lodging	1.7	9.0
Food Away From Home	0.5	4.1
Entertainment Services	0.8	6.9
Incidentals	0.0	3.3
TRAVEL PRICE INDEX	0.8	5.9
CONSUMER PRICE INDEX	0.3	4.1

Source: U.S. Travel Data Center and U.S. Bureau of Labor Statistics

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research, 1899 L Street, N.W., Washington, DC 20036. Telephone number, (202) 293-1040. Dr. Douglas C. Frechtling, Director. Ida Simmons, Editor. ISSN: 0744-6233.

TRAVEL PRINTOUT reports on the results of Data Center projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are available for $49 per year, U.S., Canada and Mexico; other foreign countries, $59 per year, payable in U.S. funds only.

TRAVEL SHOWS STRONG INCREASES IN MARCH

Travel during March soared 28 percent from year-earlier levels, according to the U.S. Travel Data Center's latest National Travel Survey results.

Following a slight decline in February, travel by Americans rose from 53 million person-trips in March 1984 (unusually low because of bad weather in many parts of the country and an April Easter weekend) to 67 million a year later. (A person-trip is measured each time anyone goes 100 miles or more away from home.)

The monthly telephone survey reported that vacation travel climbed 16 percent from the level set in March 1984.

Pleasure travel, such as visiting friends or relatives, sightseeing, or other entertainment purposes, grew 24 percent from the previous year, and business/convention travel continued to rebound.

The average trip duration rose to 5.2 nights in March 1985 from 5.1 nights one year earlier, while round trip distance grew from 880 miles in March 1984 to 990 miles a year later.

The number of U.S. adults planning vacation trips in the next six months (April through September 1985) decreased 1 percent from the previous year.

Of those planning a trip, 66 percent said they would travel by personal motor vehicle, a 4 percent increase from 1984 levels, while 32 percent plan to travel by air, an increase of 9 percent. Forty-two percent plan to use commercial lodging, and 46 percent intend to stay with friends or relatives. ##

(CONTINUED FROM PAGE 1)

The Travel Outlook forum is co-sponsored by the Travel and Tourism Research Association (TTRA), and will be held in conjunction with the Travel Industry National Conference & Marketing Showcase, sponsored by the Travel Industry Association of America (TIA).

Registration fee for the forum is $175 for TTRA, TIA and Data Center members, and $200 for others. Special discounts for attending both the forum and the conference & showcase are also available.

TTRA is the international association of travel research and marketing professionals. TIA is the national nonprofit trade association representing all components of the travel and tourism industry.

For more information about the Travel Outlook Forum, contact Ida Simmons, U.S. Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036, or call 202/293-1040. ##

WORLDWIDE LODGING SHOWS SLIGHT PROFITABILITY DECLINE

Despite a disparity in international exchange rates, profitability for the worldwide lodging industry declined only slightly in 1984, from 8.6 percent in 1983 to 8.3 percent, according to Horwath & Horwath International's Worldwide Lodging Industry 1985.

This decline could actually reflect a profitability increase when measured by the local currency standard and not in U.S. dollars, said Jonathan Bodlender of Horwath & Horwath (U.K.) London.

Although worldwide lodging occupancy levels improved strongly in 1984, rising 3.7 percent to 67 percent, room rates declined substantially, primarily due to the strength of the U.S. dollar.

The full study, Worldwide Lodging Industry 1985, is available on written request for $65.00 per copy from Laventhol & Horwath, Publications Dept., 1845 Walnut Street, Philadelphia, PA 19103.

Horwath & Horwath International is an independent accounting and management consulting firm. ##

Plan to attend the Data Center member meeting at the Travel Industry National Conference & Showcase
Wednesday, September 18, 1985
8 a.m. - 9 a.m.
Prince of Wales Room
New Orleans Hilton Riverside and Towers

States comprising the Census regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. MIDDLE ATLANTIC: New Jersey, New York, Pennsylvania. SOUTH EAST: Alabama, Delaware, Florida, Georgia, Kentucky, Maryland, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia. EAST NORTH CENTRAL: Indiana, Illinois, Michigan, Ohio, Wisconsin. WEST NORTH CENTRAL: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. WEST SOUTH CENTRAL: Arkansas, Louisiana, Oklahoma, Texas. MOUNTAIN: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. PACIFIC: Alaska, California, Hawaii, Oregon, Washington.

CURRENT TRAVEL INDICATORS

	Current Month	Current Value	Percent Change From Previous Month	Percent Change From Year-ago Month	Percent Change Year-to-date 1985/84
Establishment receipts or retail sales					
Hotels, motels and other lodging places(1)		N/A	N/A	N/A	N/A
Eating and drinking places(2)	May	$11,075 million	2.4	8.9	6.1
Gasoline service stations(2)	May	$ 8,764 million	- 0.2	1.7	- 0.5
Commercial lodging demand					
Hotel/motel occupancy rate(3)	May	67.9 percent	- 6.9	- 3.1	- 1.4
Real demand for commercial lodging(4)		N/A	N/A	N/A	N/A
Airline passenger traffic(5)					
Domestic revenue passenger-miles	May	19.1 billion	17.0	13.8	10.3
International revenue passenger-miles	May	5.5 billion	-25.0	16.0	23.9
Highway traffic volume(6)					
Rural arterial vehicle-miles	May	39.9 billion	6.6	4.3	3.6
Rail passenger traffic(7)					
Amtrak passenger-miles	May	425.0 million	6.4	10.4	5.2
Travel Price Index(8)	May	381.4	1.1	5.0	4.1
U.S. resident travel(9)					
Total person-trips	Apr	74.4 million	10.7	0.5	9.1
Vacation person-trips	Apr	45.1 million	8.2	- 8.9	7.1
Total person-nights	Apr	357.1 million	2.2	7.2	5.7
Vacation person-nights	Apr	248.1 million	6.3	2.3	0.3
Public use of national parks(10)					
Visits	May	27,563,480	29.7	16.1	15.3
Overnight stays	May	2,100,206	44.9	-33.9	-13.4
Foreign arrivals in U.S.(11)					
From overseas	Apr	659,515	- 8.2	-10.1	2.4
From Canada	May	825,700	-10.6	- 4.1	- 7.0
U.S. citizen departures(11)					
To overseas	Apr	1,144,078	- 0.4	8.7	5.0
To Canada	May	1,015,903	78.4	9.8	3.5
Domestic demand for motor gasoline(12)					
Barrels per day	May	7,036 thousand	1.5	2.4	2.6

N/A = not available

(1)Source: Laventhol and Horwath, seasonally unadjusted. (2)Preliminary; adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3)Source: Laventhol and Horwath, seasonally adjusted. (4)Source: Laventhol and Horwath, unadjusted expenditures for commercial lodging adjusted for inflation since 1972. (5)Preliminary; U.S. scheduled service air carriers. Source: U.S. Department of Transportation. (6)Source: Federal Highway Administration. (7)Source: National Railroad Passenger Corporation (Amtrak). (8)Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9)Source: U.S. Travel Data Center. (10)Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (11)Source: Statistics Canada and Nettleton Travel Research Center. (12)Preliminary; Source: U.S. Department of Energy.

U.S. Travel Data Center

1899 L Street, Northwest
Washington, D.C. 20036
(202) 293-1040

August 1985

U.S. POSTAGE
PAID
FIRST CLASS
PERMIT NO. 8523
WASHINGTON, D.C.

TRAVEL PRINTOUT

Research News for the U.S. Travel Industry

Jeanne Long
Congressional Information Service
4520 East-West Hwy., Ste. 800
Bethesda MD 20814

10/11/85 R9375-1

TRAVEL PRINTOUT

Supported by a grant from Travel Industry Association of America

Research News for the U.S. Travel Industry

U.S. Travel Data Center

September, 1985 Volume 14, Number 9

FORUM EXAMINES AMERICAN TRAVEL MARKETS

This could be the best growth year for travel since 1981, Dr. Douglas C. Frechtling, director of the U.S. Travel Data Center, told the eleventh annual Travel Outlook Forum in New Orleans.

The forum, a premier industry event since 1975, was co-sponsored by the Travel and Tourism Research Associaton and this year addressed the theme, "Uncovering Opportunities in Dynamic American Travel Markets."

According to Frechtling, a frequently quoted authority on travel and tourism, real travel industry output in the first half of 1985 rose 4.7 percent over levels posted in the first six months of 1984. Low travel price inflation and rising disposable personal income contributed significantly to the overall gain, Frechtling said.

Domestic air traffic has increased by more than 13 percent so far this year, continuing a steady rise since the extraordinary fuel price and fare increases of 1980. "For the first time on record, common carriers account for 24 percent of total intercity passenger-miles. This is a dramatic increase over their 17 percent share ten years ago," Frechtling explained.

Quoting results of the Data Center's 1985 National Travel Survey, Frechtling said U.S. resident travel during first-half 1985 rose 9 percent over the same period in 1984, totaling 456 million person-trips (one person traveling 100 miles or more away from home). "This is a welcome change from the declines we have experienced over the last three years," he added.

According to the monthly telephone survey of national probability samples of 1,500 adults, Americans spent 2.3 billion nights away from home during the first six months this year, an increase of 7 percent.

Vacation person-trips have risen 8 percent so far this year. Winter vacation travel, after a strong start, slowed considerably during the very cold February. May travel was very strong, but apparently at the expense of June, when travel rose only 1 percent over last year. "But preliminary estimates suggest July and August will show more impressive increases," Frechtling added.
(Continued on page 3)

DATA CENTER, TRAVEL WEEKLY LAUNCH SURVEY OF BUSINESS TRAVELERS

This month marks the beginning of the first comprehensive ongoing survey of all segments of the business travel market, Travel Weekly and the U.S. Travel Data Center announced recently.

The study will be conducted for Travel Weekly through the Data Center's National Travel Survey, a monthly telephone survey of 1,500 U.S. adults, which will contact 3,600 business travelers throughout the next year. The survey will provide business traveler demographics and business trip characterisics such as frequency and duration, mode of transportation, and factors affecting selection of airlines, hotels and rental cars.

Periodically the survey will also include a varying set of "focus" questions, asking information on such topical subjects as corporate travel departments and participation in frequent traveler programs.

Results of the Survey of Business Travelers will be incorporated into Travel Weekly's coverage of the travel industry for its readers and advertisers. The publication's sponsorship
(Continued on page 3)

TRAVEL PRICES ADVANCE IN JULY

Soaring intercity bus fares and lodging prices raised the cost of travel in July by 0.5 percent according to the U.S. Travel Data Center's Travel Price Index (TPI).

For comparison, the cost of consumer goods as measured by the Consumer Price Index (CPI) grew at the smaller rate of 0.2 percent in July.

The TPI, which measures changes in the seasonally unadjusted cost of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in this country, rose to 386.3 in July (1967=100).

Intercity bus fares jumped 2.4 percent in July to lead all components, followed by lodging prices with a 1.3 percent increase. Intercity railroad fares advanced 0.8 percent over the previous month.

Airline fares were unchanged in July. The costs of incidentals declined 0.3 percent, the only TPI component to decline in July.

The TPI has grown 5.2 percent since July 1984, compared with a 3.6 percent increase in the CPI.

Lodging prices have risen 8.1 percent over the past twelve months. Intercity bus fares have increased 7.0 percent, followed by a 5.7 percent appreciation in the costs of entertainment services. Taxicab and intercity train fares have grown the least in the past year, up 2.7 percent and 2.9 percent, respectively. ##

Monthly and Annual Rates of Change in the Travel Price Index and Components, July 1985

TPI Component	Monthly Percent Change June 1985 to July 1985	Annual Percent Change July 1984 to July 1985
Transportation	0.2	4.2
Airline Fares	0.0	4.0
Intercity Bus Fares	2.4	7.0
Intercity Train Fares	0.8	2.9
Taxicab Fares	0.2	2.7
Gasoline	0.2	4.2
Lodging	1.3	8.1
Food Away From Home	0.1	3.9
Entertainment Services	0.5	5.7
Incidentals	- 0.3	3.0
TRAVEL PRICE INDEX	0.5	5.2
CONSUMER PRICE INDEX	0.2	3.6

Source: U.S. Travel Data Center and U.S. Bureau of Labor Statistics

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research, 1899 L Street, N.W., Washington, DC 20036. Telephone number, (202) 293-1040. Dr. Douglas C. Frechtling, Director. Ida Simmons, Editor. ISSN: 0744-6233.

TRAVEL PRINTOUT reports on the results of Data Center projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are available for $49 per year, U.S., Canada and Mexico; other foreign countries, $59 per year, payable in U.S. funds only.

FORUM EXAMINES AMERICAN TRAVEL MARKETS (CONTINUED FROM PAGE 1)

Business and convention trips have increased by one-third so far this year, the 1985 survey revealed, prompting Frechtling to speculate that business travel this year will surpass the 1981 level, the last peak year for this activity.

Frechtling ended with a hopeful message to an industry that has been buffeted by sporadic ups and downs since the 1981-82 recession: "Americans have restocked on major durables and are diverting their increasing discretionary income to leisure travel. Businesses, as well, are financing more travel as the rising economy generates more sales and investment opportunities."

Other sessions focused attention on important American travel markets. Highlights include:

• Older travelers: "Americans aged 65 and older comprise the second-fastest growing travel market in the United States, containing 27 million people and 9 percent of the U.S. population. By the year 2000, this figure will have increased to 35 million, and by 2030 will have more than doubled." -- Bob Forbes, director of the Special Services Department, American Association of Retired Persons.

• Frequent business travelers: "Seventy-four percent of frequent business travelers have a college degree and over one-third have completed some graduate work. Over 60 percent of these travelers are between the ages of 25 and 44." -- Jennifer Armstrong, Manager--Marketing Research, Trans World Airlines.

The complete edited proceedings of the eleventh annual Travel Outlook Forum, with tables and charts, will be printed in the 150-page 1985-86 Outlook for Travel and Tourism, available in November 1985. To obtain a copy, send $80.00 (prepaid only) to the U.S. Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036.

The report will be sent to members of the Data Center and the Travel and Tourism Research Association as a membership benefit. ##

SURVEY (CONTINUED FROM PAGE 1)

represents a commitment to increasing the information available about the travel consumer. Travel Weekly currently sponsors the well-known biennial Louis Harris study of travel agency business.

The Survey of Business Travelers builds on a similar proprietary study conducted by the Data Center in 1984-85 for a syndicate of industry corporations. While Travel Weekly plans to publish results of the current study, the Data Center's clients may continue to add proprietary questions to the survey, according to Assistant Director Suzanne Cook, who has headed the survey since it began. ##

TRAVEL INTENTIONS DECLINE

Americans' plans to take vacation trips in the six months following May 1985 fell 6 percent from year-earlier levels, according to the U.S. Travel Data Center's latest National Travel Survey results.

Plans to travel by personal motor vehicle increased by 1 percent, while plans to travel by air fell 21 percent below intentions recorded in 1984.

Of those planning a vacation trip, 44 percent plan to use hotel/motel accommodations, up from 39 percent in 1984, and 40 percent plan to stay with friends and relatives, an increase of only one percentage point from the previous year. Average planned trip duration fell from 8.1 nights in 1984 to 7.4 nights in 1985.

Travel during May 1985 showed strong increases over the level recorded for the previous year, rising 23 percent to 98 million person-trips. (A person-trip is measured each time anyone goes 100 miles or more away from home.) ##

States comprising the Census regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. MIDDLE ATLANTIC: New Jersey, New York, Pennsylvania. SOUTH EAST: Alabama, Delaware, Florida, Georgia, Kentucky, Maryland, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia. EAST NORTH CENTRAL: Indiana, Illinois, Michigan, Ohio, Wisconsin. WEST NORTH CENTRAL: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. WEST SOUTH CENTRAL: Arkansas, Louisiana, Oklahoma, Texas. MOUNTAIN: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. PACIFIC: Alaska, California, Hawaii, Oregon, Washington.

CURRENT TRAVEL INDICATORS

	Current Month	Current Value	Percent Change From Previous Month	Percent Change From Year-ago Month	Percent Change Year-to-date 1985/84
Establishment receipts or retail sales					
Hotels, motels and other lodging places(1)		N/A	N/A	N/A	N/A
Eating and drinking places(2)	Jun	$10,976 million	0.0	6.8	6.1
Gasoline service stations(2)	Jun	$ 8,557 million	- 2.2	1.5	- 0.2
Commercial lodging demand					
Hotel/motel occupancy rate(3)	Jun	64.7 percent	- 1.7	2.4	- 1.5
Real demand for commercial lodging(4)		N/A	N/A	N/A	N/A
Airline passenger traffic(5)					
Domestic revenue passenger-miles	Jun	19.3 billion	0.6	5.9	9.5
International revenue passenger-miles	Jun	6.7 billion	22.3	11.4	21.0
Highway traffic volume(6)					
Rural arterial vehicle-miles	Jun	41.5 billion	3.9	2.9	3.5
Rail passenger traffic(7)					
Amtrak passenger-miles	Jun	530.9 million	4.8	9.6	5.9
Travel Price Index(8)	Jun	384.5	0.8	5.6	4.3
U.S. resident travel(9)					
Total person-trips	May	98.3 million	32.1	22.7	12.6
Vacation person-trips	May	66.2 million	46.8	22.6	11.4
Total person-nights	May	471.8 million	32.1	45.1	14.5
Vacation person-nights	May	364.1 million	46.6	29.7	7.8
Public use of national parks(10)					
Visits	Jun	32,284,481	17.1	6.2	12.6
Overnight stays	Jun	2,100,206	44.9	-33.9	-13.4
Foreign arrivals in U.S.(11)					
From overseas	May	704,634	6.8	2.5	2.4
From Canada	Jun	862,340	2.0	6.0	9.6
U.S. citizen departures(11)					
To overseas	May	1,370,062	19.8	12.2	6.7
To Canada	Jun	1,622,242	59.7	14.2	7.3
Domestic demand for motor gasoline(12)					
Barrels per day	Jun	6,975 thousand	- 0.9	0.0	2.2

N/A = not available

(1)Source: Laventhol and Horwath, seasonally unadjusted. (2)Preliminary; adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3)Source: Laventhol and Horwath, seasonally adjusted. (4)Source: Laventhol and Horwath, unadjusted expenditures for commercial lodging adjusted for inflation since 1972. (5)Preliminary; U.S. scheduled service air carriers. Source: U.S. Department of Transportation. (6)Source: Federal Highway Administration. (7)Source: National Railroad Passenger Corporation (Amtrak). (8)Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9)Source: U.S. Travel Data Center. (10)Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (11)Source: Statistics Canada and Hattleton Travel Research Center. (12)Preliminary; Source: U.S. Department of Energy.

U.S. Travel Data Center

1899
L Street
Northwest
Washington, D.C.
20036
(202) 293-1040

U.S. POSTAGE
PAID
FIRST CLASS
PERMIT NO. 8523
WASHINGTON, D.C.

September 1985

TRAVEL PRINTOUT

Research News for the U.S. Travel Industry

Jeanne Long
Congressional Information
Service
4520 East-West Hwy., Ste. 800
Bethesda MD 20814